The Raiser's Edge™

Dashboard Guide

022113

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What Is In This Guide?

In the *Dashboard Guide*, you learn how take a snapshot of your fundraising success at any given time. *Dashboard* is ideal for Development Directors, executives, or any user who needs quick access to data. You can also learn about the following.

- “Dashboard Panels on the Home Page” on page 52
- “Dashboard Panels” on page 54
- “Create a new Dashboard page” on page 2
- “Create a new Dashboard panel” on page 12
- “Hide a panel” on page 28
- “Graph and customize a panel” on page 30
- “Send a panel as email” on page 36

How Do I Use These Guides?

The Raiser’s Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the ***Raiser’s Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser’s Edge*** by accessing the help file in the program. Select **Help**, **The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

Dashboard Basics

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Dashboard Page Basics

Warning: Before using *Dashboard*, you must install Microsoft *Office* Web components. For more information, see ***The Raiser's Edge*** *Installation Guide*.

Even though up to 255 panels can display on the Dashboard page, you can create an unlimited amount of Dashboard pages. For example, you can create a Dashboard page for Gift panels, a second Dashboard page for Solicitor panels, and a third Dashboard page for Action panels.These pages display on the shell of ***The Raiser's Edge*** when you click **Dashboard** on the Raiser's Edge bar. You can select the Dashboard page you want to view by selecting a Dashboard in the **Dashboard** field on the Dashboard action bar.

From the Dashboard page action bar, you can customize your Dashboard page to display all the panels you need; refresh your entire Dashboard page at once; and create, save, and delete Dashboard pages.

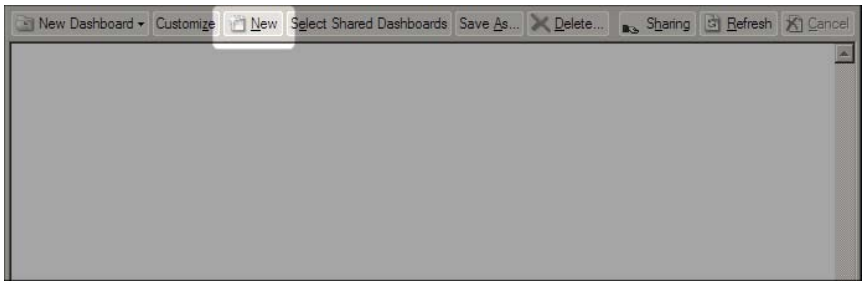
Create a new Dashboard page

A Dashboard page contains up to 255 panels. To organize all these panels, it is beneficial to maintain certain Dashboard panels on certain Dashboard pages. For example, you may want to keep all of your boss's most frequently requested information on one Dashboard page and all panels pertaining to board members on a separate Dashboard page.

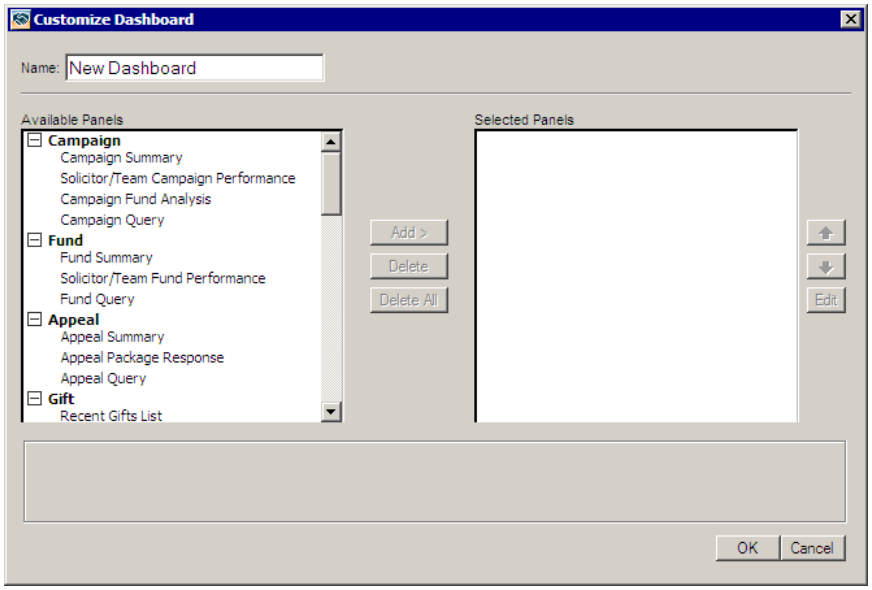
Scenario: You are gearing up for the new year's Annual Campaign. As a part of monitoring the status of this campaign, you want to keep track of your solicitors' daily activity. To easily and quickly view this information, create a Dashboard page for solicitor panels.

1. On the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears.

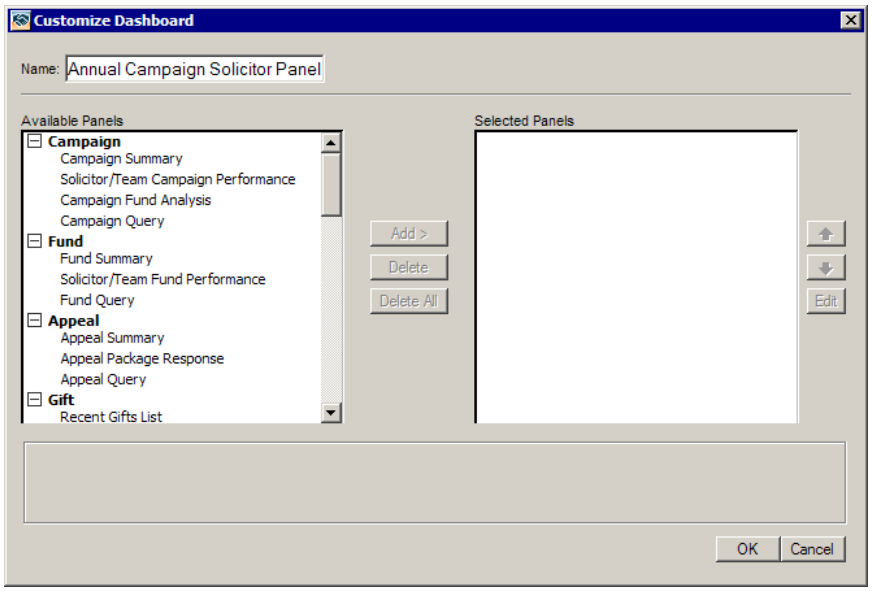
2. On the Dashboard page action bar, click **New**.



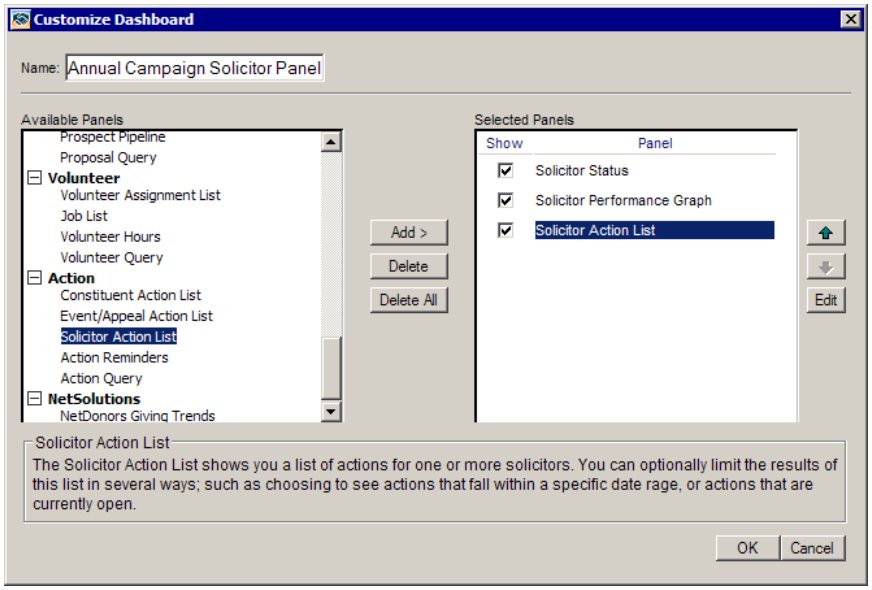
A new Customize Dashboard page appears.



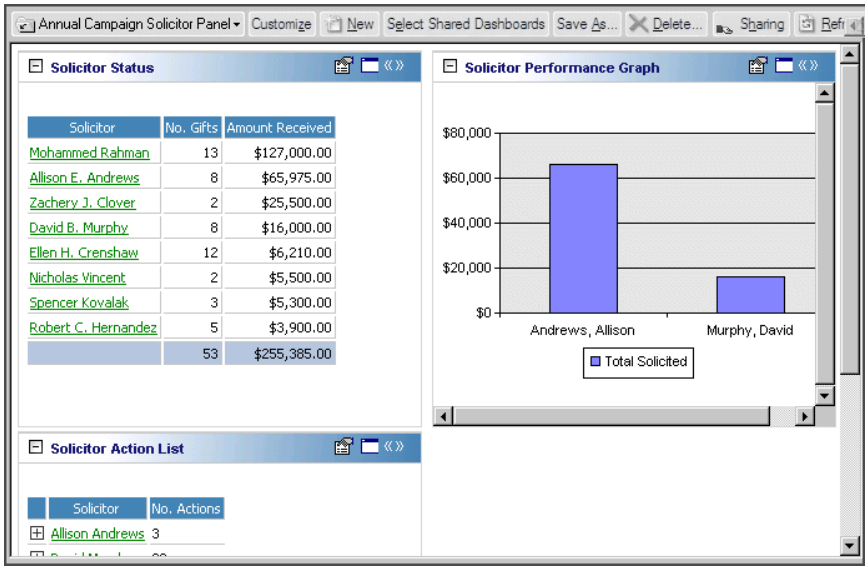
3. In the **Name** field, enter “Annual Campaign Solicitor Panels”.



4. Select the Solicitor Status, Solicitor Performance Graph, and Solicitor Action List panels for the Dashboard page. For more information about creating new Dashboard panels, see “Create a new Dashboard panel” on page 12.



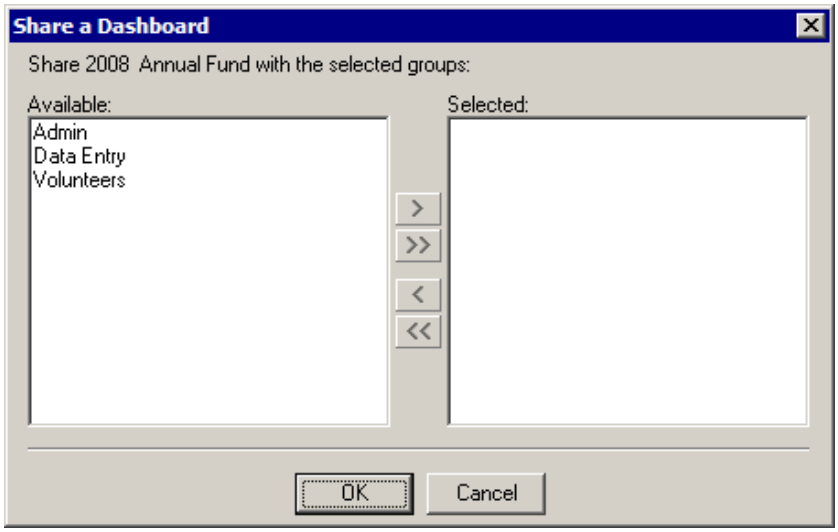
5. After you finish creating your Dashboard panels, click **OK** on the Customize Dashboard panel. The new Dashboard page appears on the Raiser’s Edge shell.



Share a page

You can share Dashboard pages with users that have security rights to view dashboards. For example, you can share your 2008 Annual Fund Dashboard page with users in the Administrator security group.

1. From a Dashboard page, click **Sharing** on the action bar. The Share a Dashboard screen appears.



2. In the **Available** box, select the security user group(s) you want to share the Dashboard page with, and click the single right arrow to move the group(s) to the **Selected** box. To select all groups, click the double arrow.

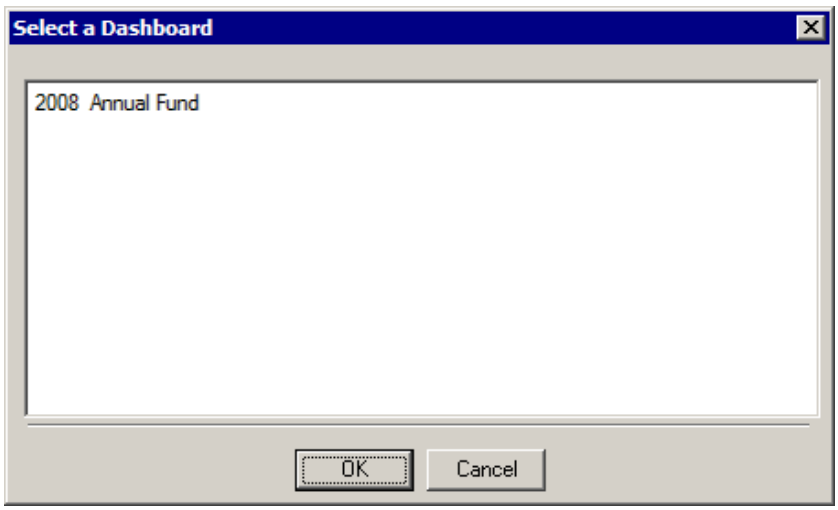
   For information about security groups, see the *Configuration & Security Guide*.

3. Click **OK**. You return to the Dashboard page.

Access a shared page

Users in the security group for a shared Dashboard page can select to view the dashboard on his or her Dashboard page.

1. To view a shared dashboard, click **Select Shared Dashboards** on the action bar. The Select a Dashboard screen appears.



2. Select the shared dashboard you want to view. If a shared dashboard does not appear on the screen, you do not have security rights. You must be in the security group for which the dashboard is shared.

   For information about security groups, see the *Configuration and Security Guide*.

3. Click OK. The shared dashboard appears on your Dashboard page.

Save a page

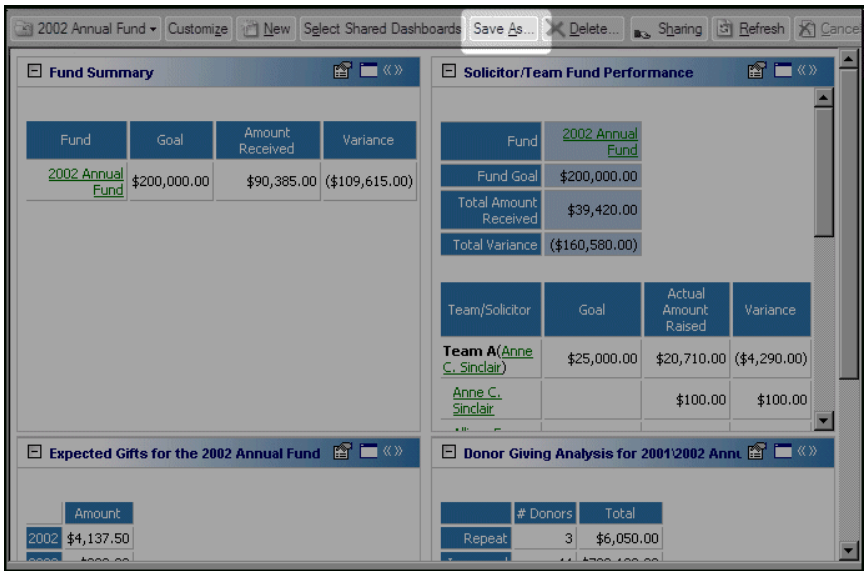
When you create a new Dashboard page, the customizations you select for that Dashboard page automatically save. However, you may find times when you need to rename and save the Dashboard page with another name.

For example, throughout the year 2002, you displayed a 2002 Annual Fund Dashboard page to monitor and analyze the progress of the 2002 Annual Fund. You are gearing up for the 2003 Annual Fund, and you want to display the same panels for a new 2003 Annual Fund Dashboard page. You can create this page by using the **Save as** link on the Dashboard page action bar.

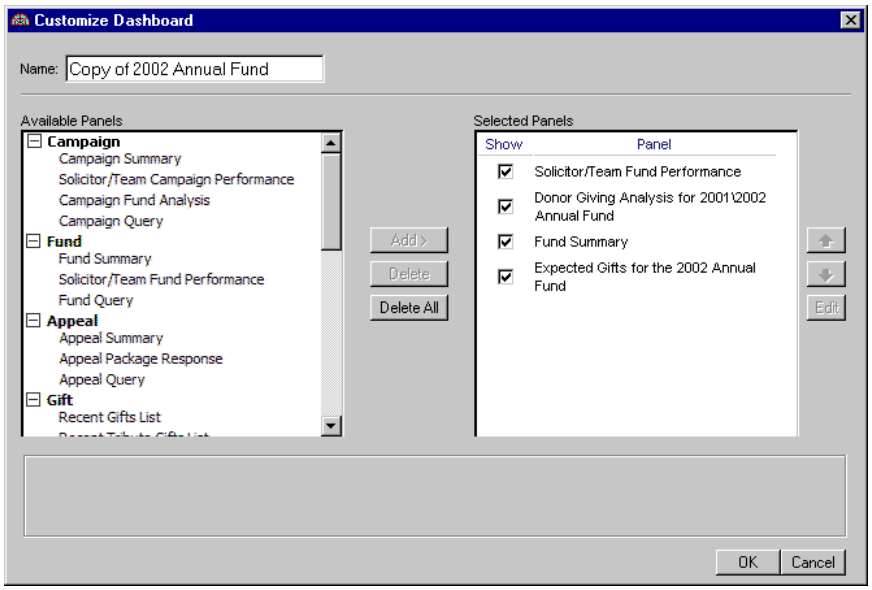
1. On the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears.

Warning: Make sure the Dashboard page you intend to use is selected in the **Dashboard** field on the Dashboard page action bar.

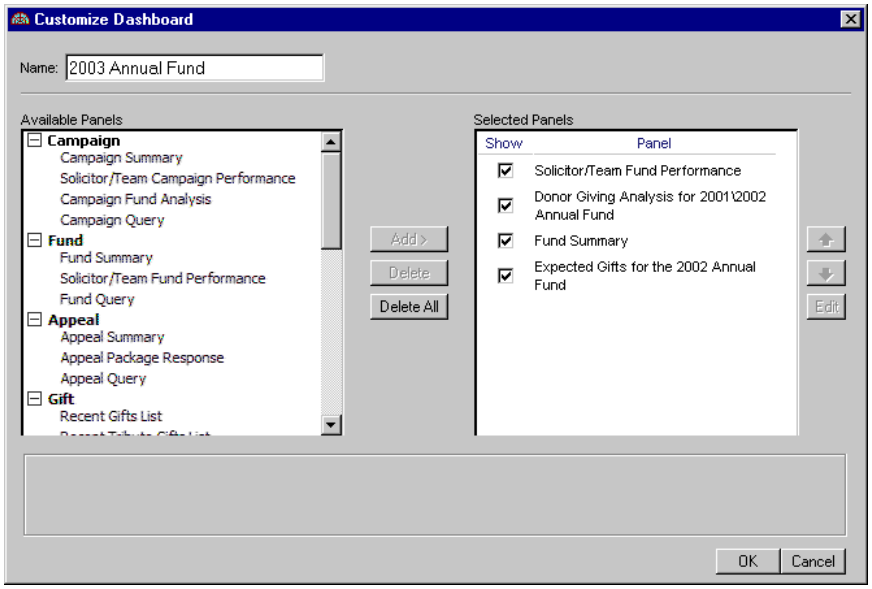
2. On the Dashboard page action bar, click **Save as**.



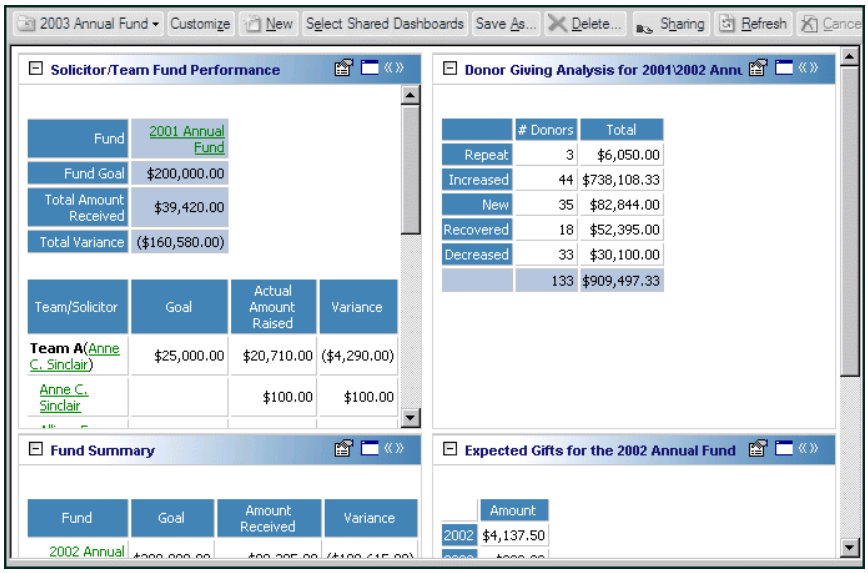
The Customize Dashboard panel appears. A copy of the Dashboard page displays in the **Name** field.



3. In the **Name** field, enter the name of the new Dashboard page.



4. To save the new Dashboard page, click **OK**. The Dashboard page displays on the Raiser's Edge shell.



To update each individual panel, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Properties**. For more information about the Dashboard panel action bar, see "Dashboard Action Bars" on page 49. For more information about modifying a Dashboard panel, see "Open and edit a panel" on page 20.

Delete a page

Warning: Once you delete a Dashboard page, you cannot retrieve the information. We recommend you write down filter and output information in case you want to create the panel again in the future.

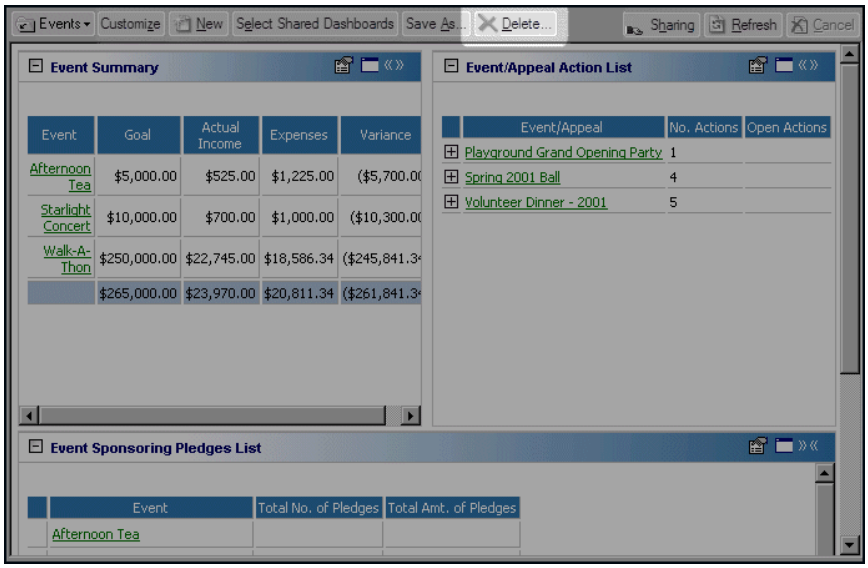
As your organization completes tasks, such as a campaign or membership drive, it becomes unnecessary to maintain Dashboard pages for these tasks on the Raiser's Edge shell. Even though you can create an unlimited number of Dashboard pages, it is a good idea to delete the pages you do not need.

For example, you recently held a Spring Ball and a Volunteer Dinner for your volunteers. You created a Dashboard page for these events to view the Event Summary, Event/Appeal Action List and Event Sponsoring Pledges List panels. Both events were held last week, and you now want to delete the Dashboard page. You can delete this page by using the Delete link on the Dashboard page action bar.

1. On the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears.

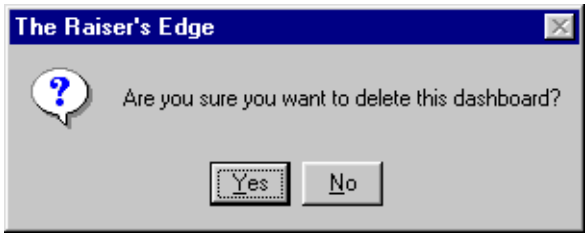
Warning: Make sure the Dashboard page you intend to delete is selected in the **Dashboard** field on the Dashboard page action bar.

2. On the Dashboard page action bar, click **Delete**.



Note: If you do not use the optional module *Event Management*, the Event/Appeal Action List is called the Appeal Action List and only applies to appeal actions.

A message appears.



3. To permanently delete the Dashboard page, click **Yes**. The Dashboard page is removed from the Raiser's Edge shell.

Refresh a page

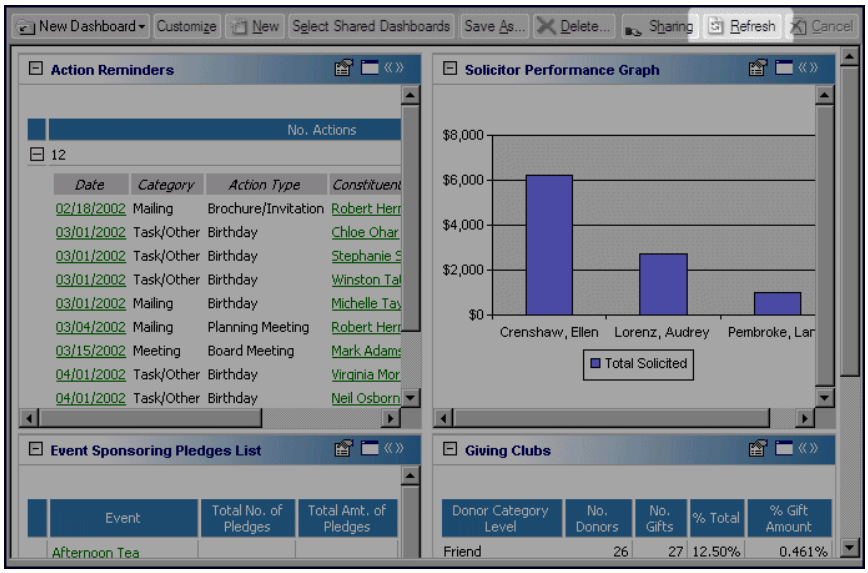
After you enter new data into ***The Raiser's Edge***, it is important to refresh your Dashboard page so any new information is included in your panel results. You can quickly refresh every panel on a Dashboard page at the same time from the Dashboard page action bar. For more information about refreshing an individual Dashboard panel, see "Dashboard Panel Action Bar" on page 50.

Scenario: You are in the middle of your latest fund drive, and you just posted three gift batches that all contained at least 250 new gifts for your organization. You maintain all your gift Dashboard panels together on one page. Refresh this page using the Dashboard page action bar to update your panel results at the same time.

1. On the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears.

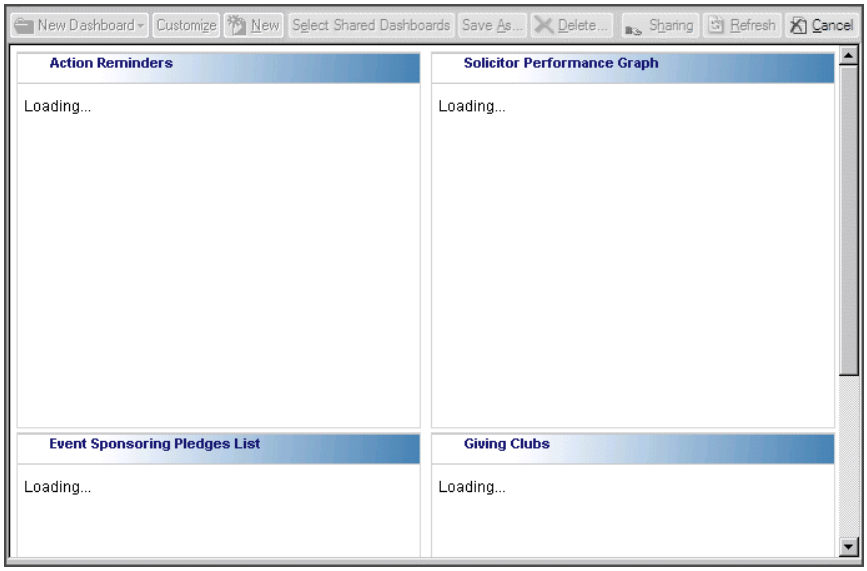
Warning: Make sure the Dashboard page you intend to refresh is selected in the **Dashboard** field on the Dashboard page action bar.

2. On the Dashboard page action bar, click **Refresh**.



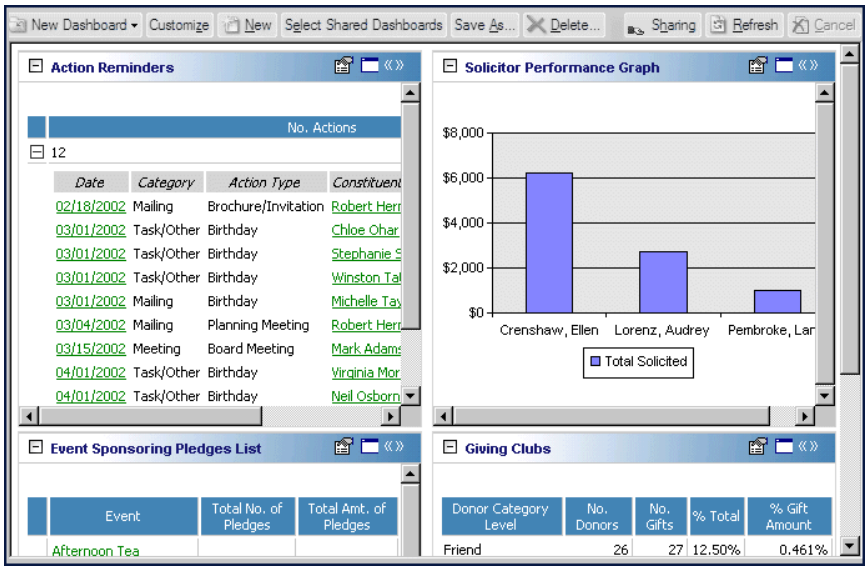
Note: When the Dashboard page is updating, you can navigate to other pages in ***The Raiser's Edge 7***. For example, you can go to the Reports page while the Dashboard page refreshes the Dashboard panels.

The Dashboard page automatically updates.



Note: If you select a different Dashboard page in the **Dashboard** field on the action bar, the page you select does not refresh automatically. You must click **Refresh** on the Dashboard page action bar to update your panels.

Once the refreshing is complete, your Dashboard page appears again with updated data.



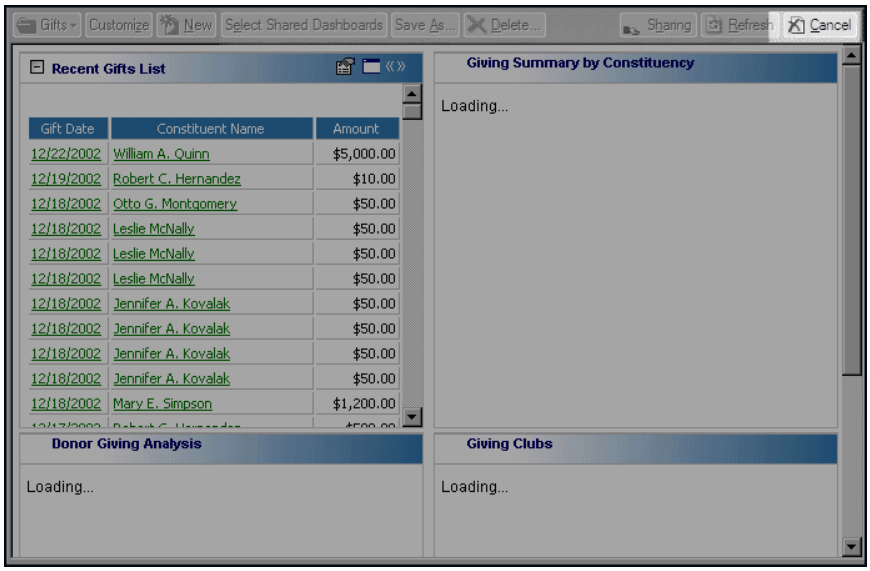
Cancel a page

If you decide you need to cancel a Dashboard panel or page during processing, you can click **Cancel** on the Dashboard page action bar. For example, you click **Refresh** on the Dashboard panel action bar to update all of the panels that exist on the Dashboard page. While the update is processing, you remember you want to print the Overdue Gifts List panel as it existed before you clicked **Refresh**. This way, you can easily compare the results with the update results after you refresh the Dashboard page. Click **Cancel** on the Dashboard page action bar to stop processing and return back to the original panel results.

It is important to remember that if a panel has completed the Loading process before you click **Cancel**, you cannot revert the panel back to the previous results. Any panel with “Loading” displayed in the Dashboard panel when you click **Cancel** returns back to the original panel results.

Warning: In this example, the Recent Gifts List cannot return to the original panel results because you clicked **Cancel** after the Recent Gifts List finished the Loading process.

1. While the Dashboard panel is processing, click **Cancel**.



The panel processing is cancelled and you return to the original panel results.

Dashboard Panel Basics

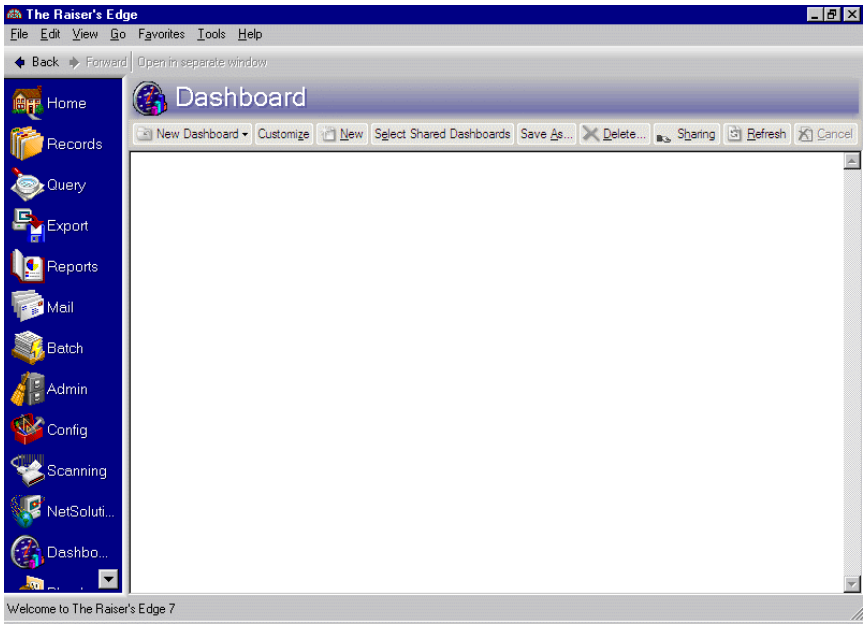
Working in Dashboard is consistent between panels. You can create, open, modify, hide, send as email, print, and delete all panels. Once you understand the basics of each process, you can quickly and easily use any panel you choose. Any selections you make on the Edit Panel screen save automatically, making future summarizing, listing, and graphing simple. The filter and output choices you make do not change unless you edit the panel or delete the panel from the Customize Dashboard panel.

Create a new Dashboard panel

The wealth of information you gain in *Dashboard* begins with understanding how to create a Dashboard panel. For this procedure, we use the Solicitor Status panel.

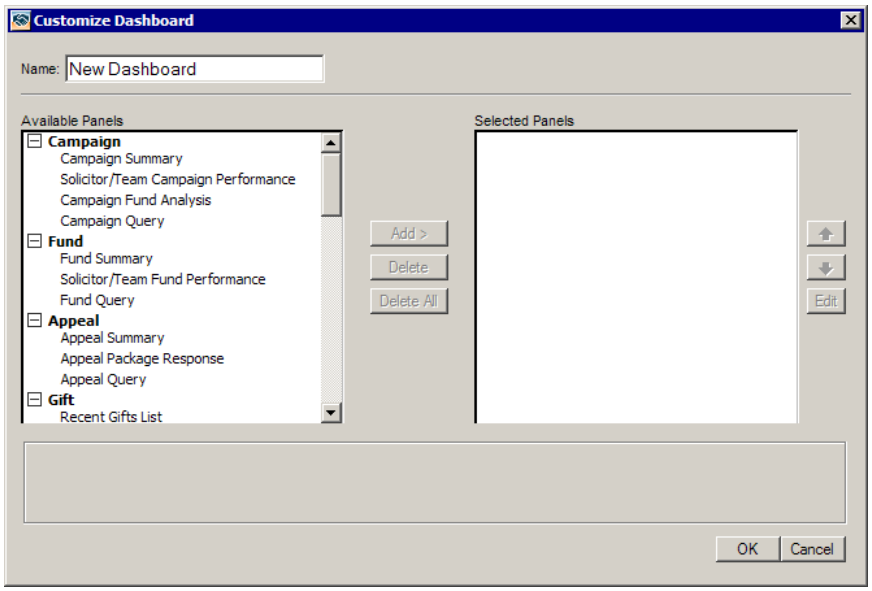
Scenario: You want to view your organization's top ten solicitors and the gift amounts your organization received last year as a result of their efforts. Of these gift amounts, you only want to see Cash and Pledge Payments for the 2000 Annual Fund. For your output, you want to include the number of gifts, amount received, and the number of actions the solicitor made. Generate the Solicitor Status summary to create the results you need.

1. On the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears.



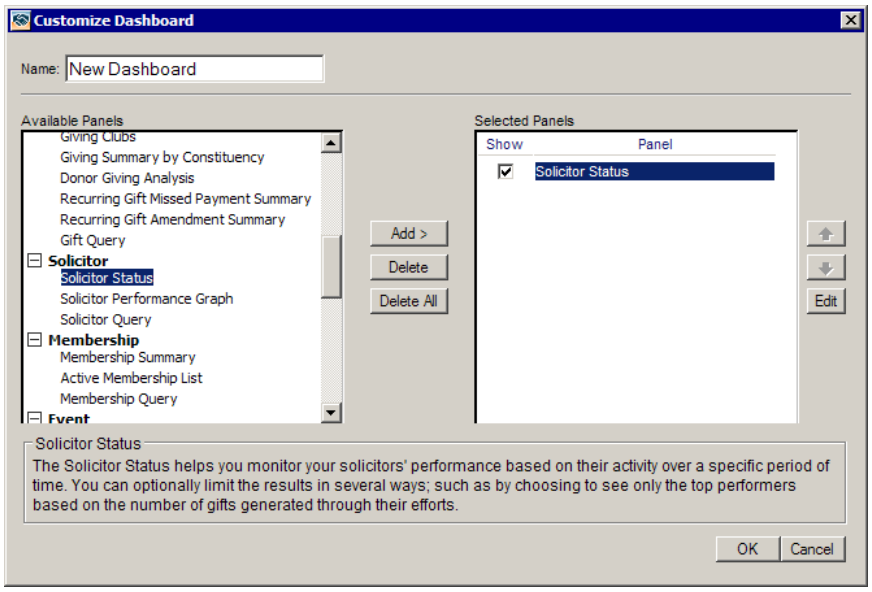
Note: To collapse a Dashboard panel type, such as Campaign, click the "-" in the square next to Campaign in the **Available Panels** box. To expand the Dashboard panel type, click the "+" in the square next to the type you need in the **Available Panels** box.

2. Click **Customize** on the action bar. The Customize Dashboard panel appears.

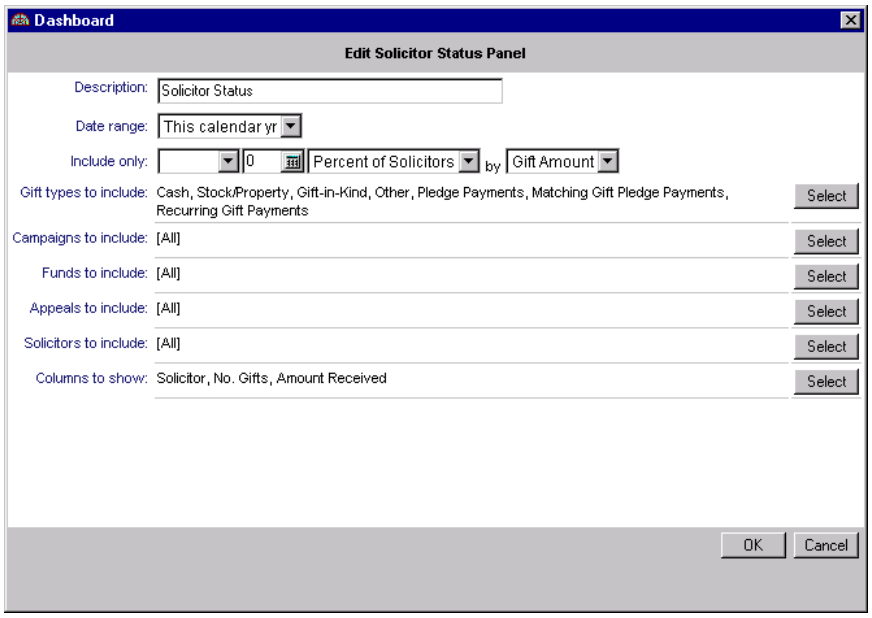


Warning: In order to access *Dashboard*, you must have rights established from the **Security** link of *Administration*.

3. In the **Available Panels** box, under Solicitor, highlight the Solicitor Status panel and click **Add**. Solicitor Status moves to the **Selected Panels** box.

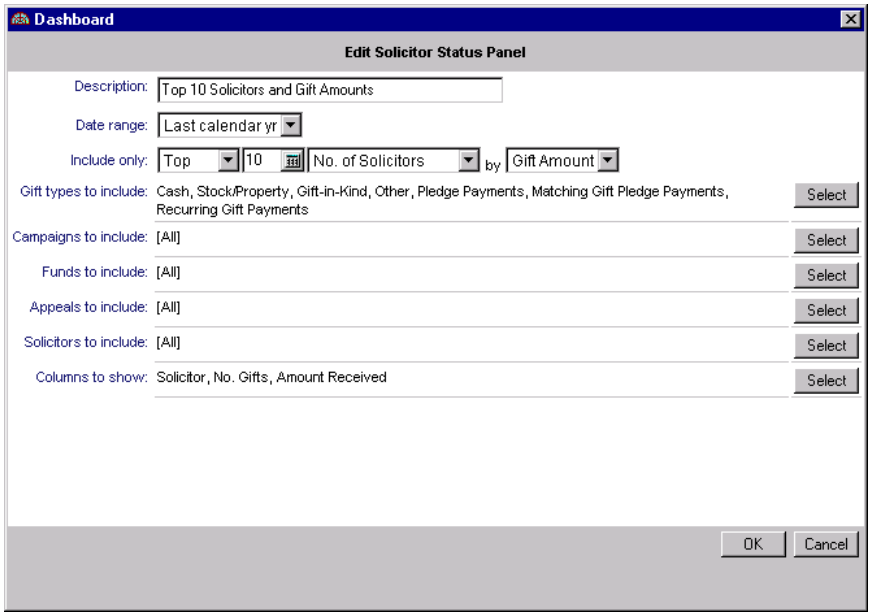


4. Highlight Solicitor Status and click **Edit**. The Edit Solicitor Status Panel appears.



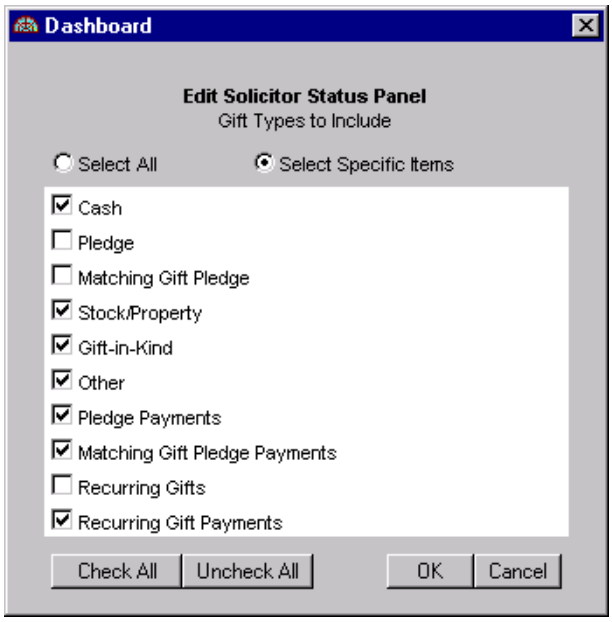
Note: You can leave the default title in the **Description** field, or you can manually enter a title you prefer. Changing the **Description** helps you recognize specific panel results if you have multiple panels of the same type selected on the Customize Dashboard panel.

5. In the **Description** field, enter “Top 10 Solicitors and Gift Amounts” for the summary title.
6. In the **Date range** field, select “Last calendar yr”.
7. In the **Include only [ ] [ ] [ ] by [ ]** fields, select **Include only** “Top” “10” “No. of Solicitors” **by** “Gift Amount”. This filters your top 10 solicitors and all of the gifts your organization has received as a result of the solicitors’ efforts.



Note: To quickly choose all gift types in Dashboard, click **Check All** or choose **Select All**. If you want to quickly remove all gift types, click **Uncheck All**. To select individual gift types, choose **Select Specific Items**.

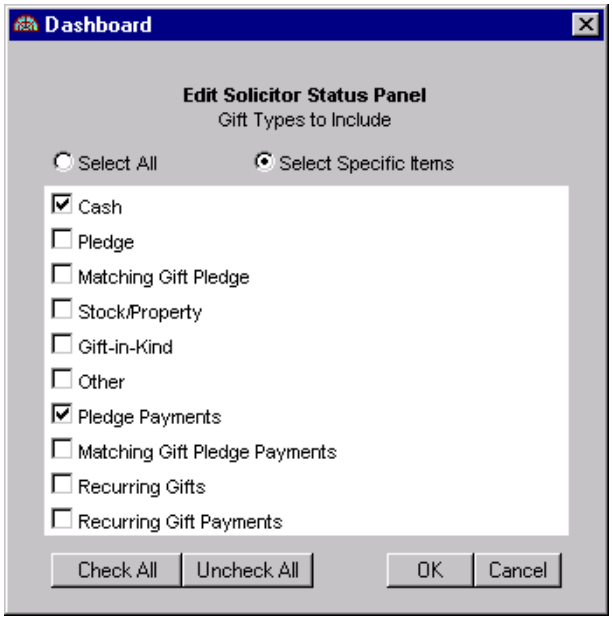
8. In the **Gift types to include** row, click **Select**. The Edit Solicitor Status Panel Gift Types to Include screen appears.



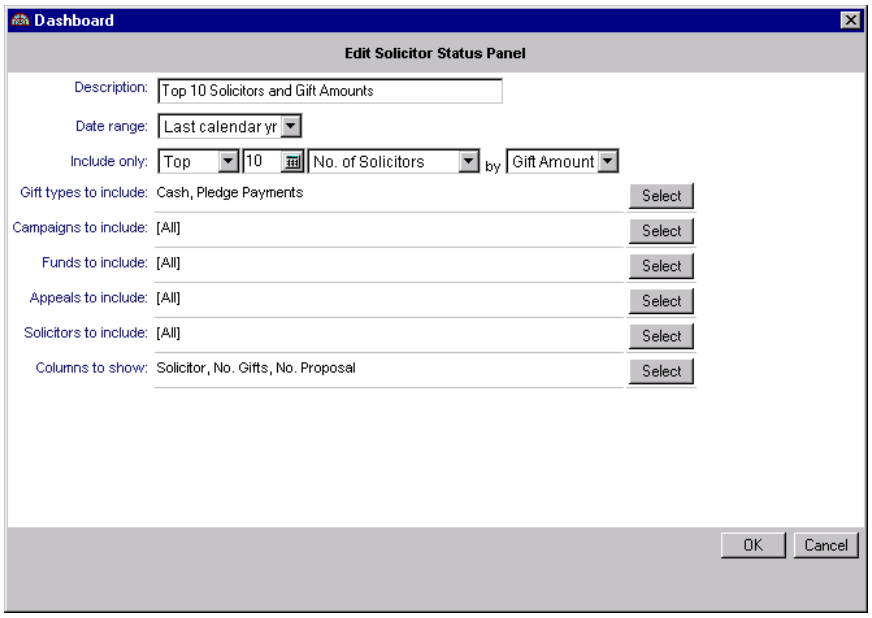
9. To quickly remove all the filters that default automatically, click **Uncheck All**.

Warning: In this procedure, only the gift types of Cash and Pledge Payment Cash display in the results panel. For more information on calculating Pledge Payments in Dashboard, see "Pledge Payments and Matching Gift Pledge Payments" on page 53.

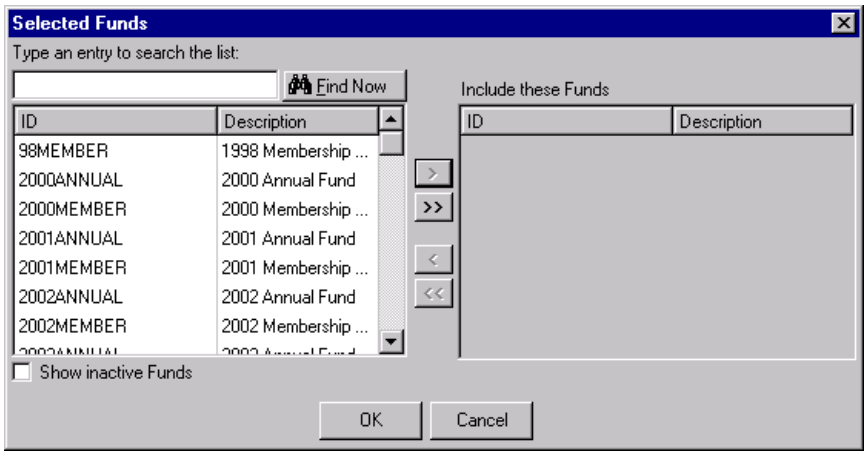
10. Mark the **Cash** and **Pledge Payments** checkboxes to only include these gift types.



11. Click **OK**. You return to the Edit Solicitor Status Panel.

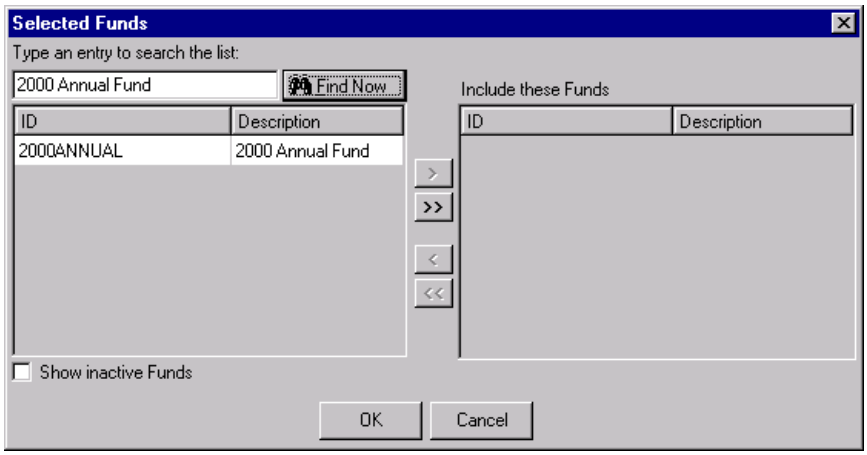


12. In the **Campaigns to include** row, leave the default "[All]" because you do not want to filter campaigns for this summary procedure.
13. In the **Funds to include** row, click **Select**. The Selected Funds screen appears.

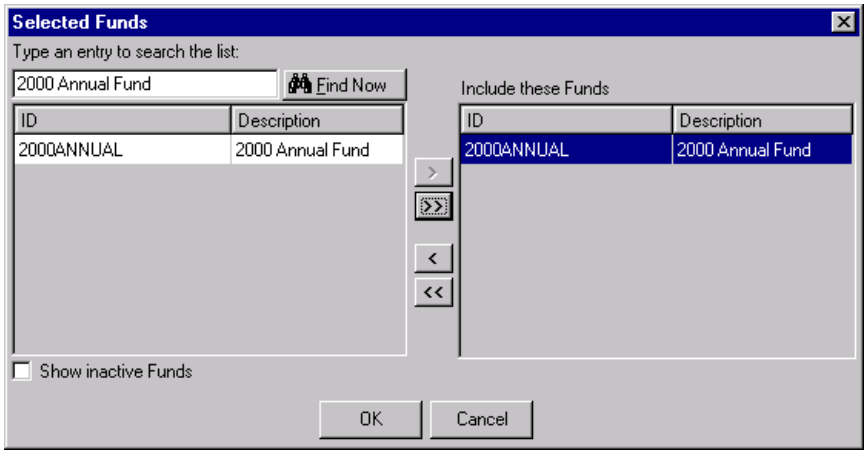


Note: When using the **Find Now** field, do not include quotation marks in the field.

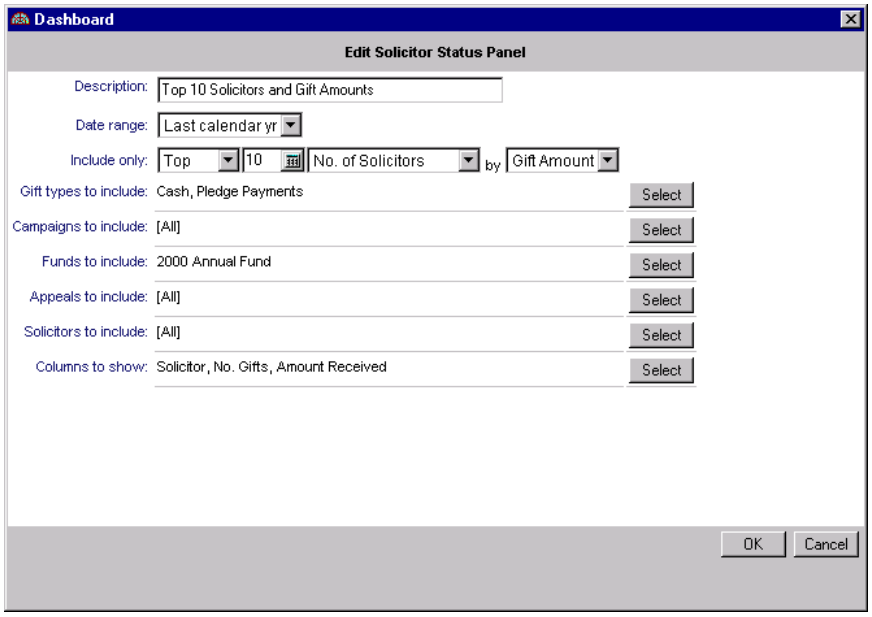
14. In the **Find Now** field, enter “2000 Annual Fund”. Click **Find Now**. This narrows down your search.



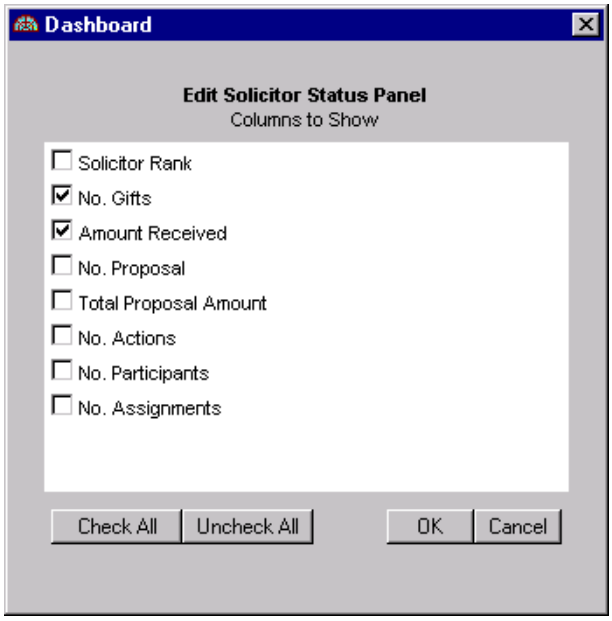
15. Highlight “2000 Annual Fund” in the box on the left, and click the single right arrow. The 2000 Annual Fund moves to the **Include these Funds** box.



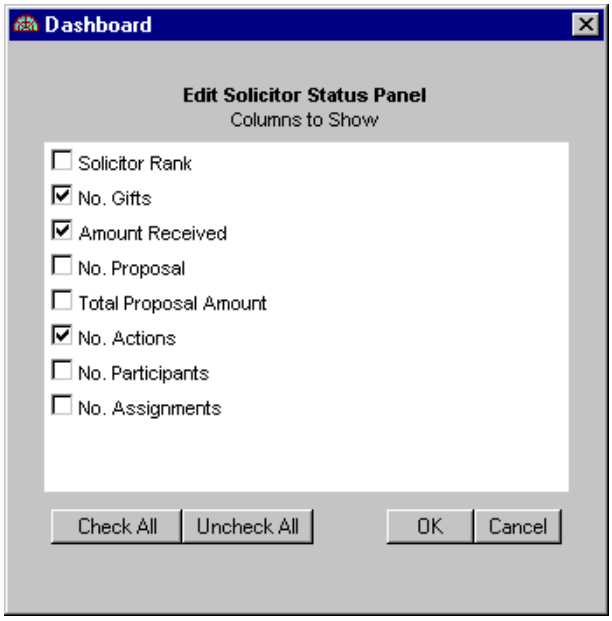
16. Click **OK**. You return to the Edit Solicitor Status Panel.



17. In the **Appeals to include** row, leave the default “[All]” because you do not want to filter appeals for this summary procedure.
18. In the **Solicitors to include** row, leave the default “[All]” because you do not want to filter solicitors for this summary procedure.
19. To choose the optional columns you want in the Solicitor Status panel results, in the **Columns to Show** row, click **Select**. The Edit Solicitor Status Panel Columns to Show screen appears.

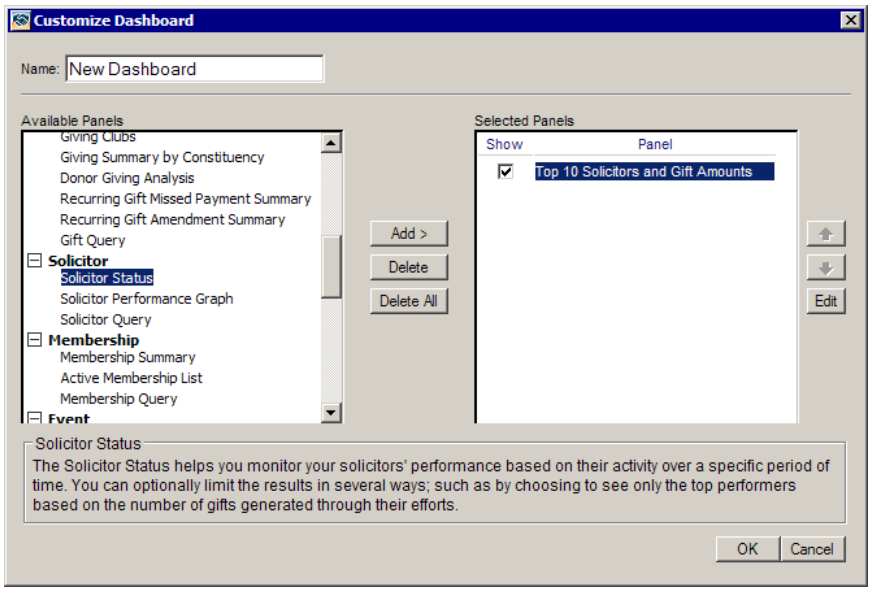


20. To quickly remove all the columns that default automatically, click **Uncheck All**.
21. Mark the **No. Gifts**, **Amount Received**, and **No. Actions** checkboxes to include these as columns in your summary results.



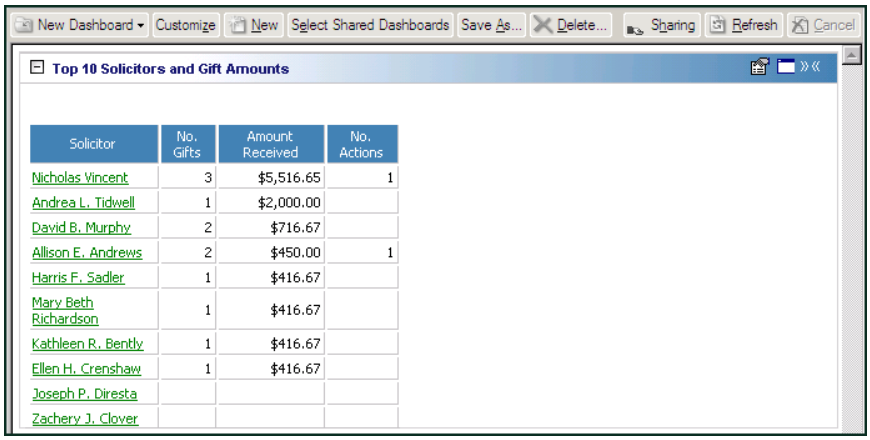
22. Click **OK**. You return to the Edit Solicitor Status Panel.

23. Click **OK**. You return to the Customize Dashboard panel.



Note: To open a solicitor's constituent record, click the solicitor's name in the panel results.

24. To process the results, click **OK**. The panel results display on the Dashboard page.



Solicitor	No. Gifts	Amount Received	No. Actions
Nicholas Vincent	3	$5,516.65	1
Andrea L. Tidwell	1	$2,000.00	
David B. Murphy	2	$716.67	
Allison E. Andrews	2	$450.00	1
Harris F. Sadler	1	$416.67	
Mary Beth Richardson	1	$416.67	
Kathleen R. Bently	1	$416.67	
Ellen H. Crenshaw	1	$416.67	
Joseph P. Diresta			
Zachery J. Clover			

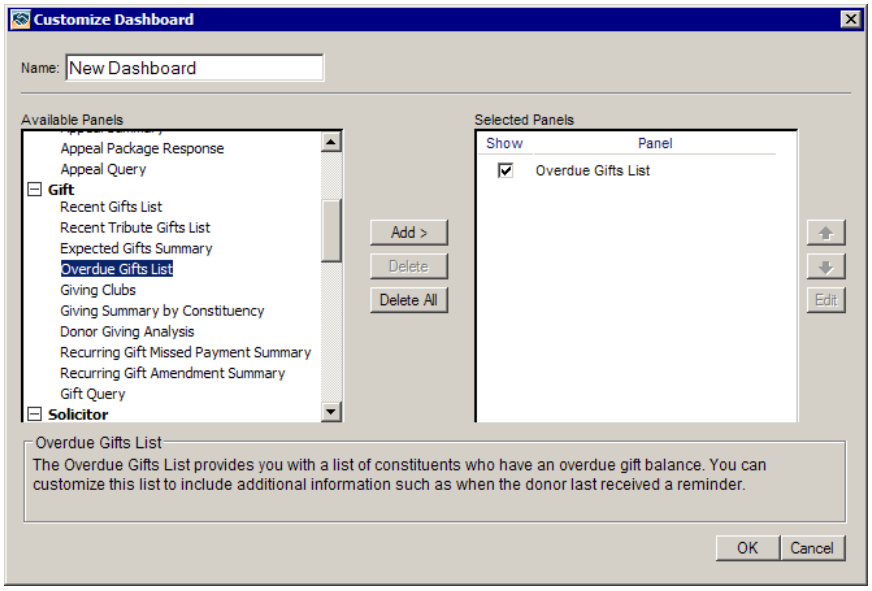
Open and edit a panel

Although you can run multiple panels of the same type, you may find times when you need to edit an existing panel in the **Selected Panels** box on the Customize Dashboard panel. For example, you may want to process the Campaign Summary panel for the Annual Campaign instead of the Scholarship Campaign. You can make this change easily on the Edit Campaign Summary Panel. For this procedure, we use the Overdue Gifts List as an example.

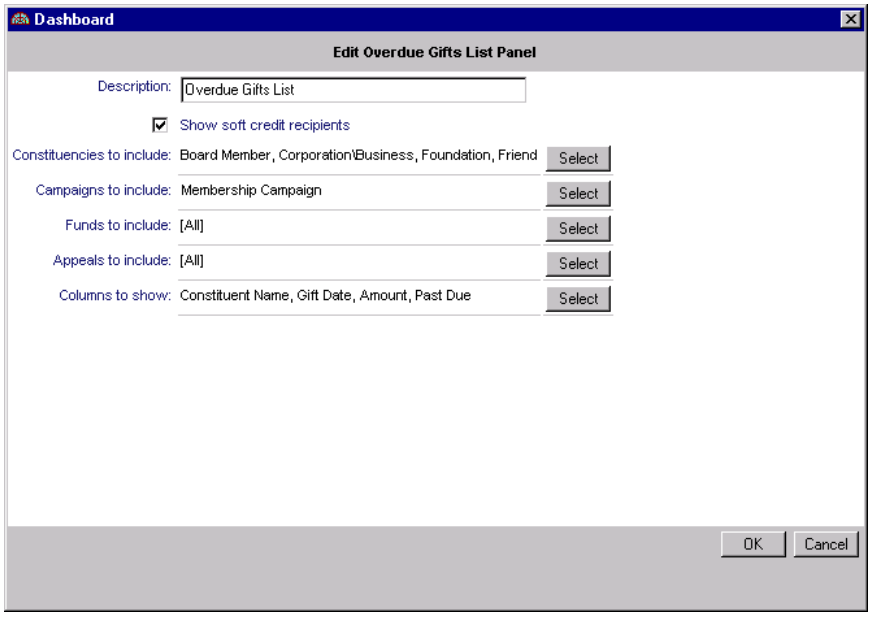
Scenario: Currently, your Overdue Gifts List includes overdue gifts for the Membership Campaign for constituents with Board Member, Corporation\Business, Foundation, or Friend constituent codes. You want to edit this summary to include all campaigns and all constituent codes. However, you want this summary to include gifts for the 2002 Membership Fund only. Edit the Overdue Gifts List from the Customize Dashboard panel to update the summary information you need.

Note: You can also edit a panel by clicking **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Properties** to make your edits. For more information about Dashboard action bars, see "Dashboard Action Bars" on page 49.

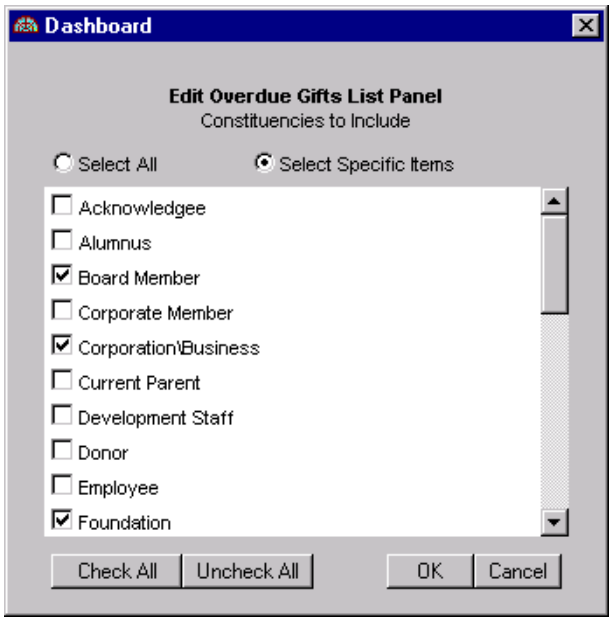
1. From the Dashboard page, click **Customize** on the action bar. The Customize Dashboard panel appears. If you have not created a Dashboard summary, see "Create a new Dashboard panel" on page 12. For more information about accessing the Dashboard page, see "Navigate in Dashboard" on page 45.



2. In the **Selected Panels** box, highlight Overdue Gifts List, and click **Edit**. The Edit Overdue Gifts List Panel appears.

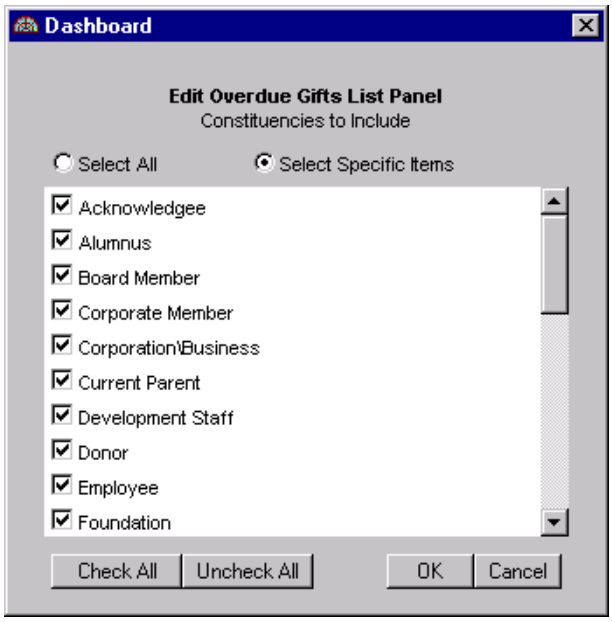


3. In the **Constituencies to include** row, click **Select**. The Edit Overdue Gifts List Panel Constituencies to Include screen appears.

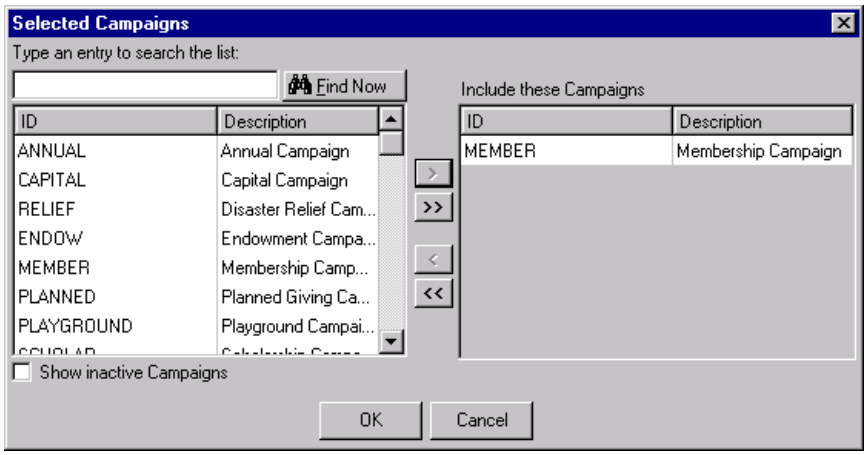


Note: By clicking **Check All** you are selecting the constituent records that have any constituent code entered on the Bio 2 tab of the constituent record. If you select **Select All**, you include these same constituents, plus constituents without a constituent code. For example, if Kathleen Bently does not have a constituent code listed on her Bio 2 tab, she is included for processing if you select **Select All**. If you click **Check All**, Kathleen is not included because she does not have one of the constituent codes listed on her Bio 2 tab.

4. To include all constituent codes, click **Check All**.

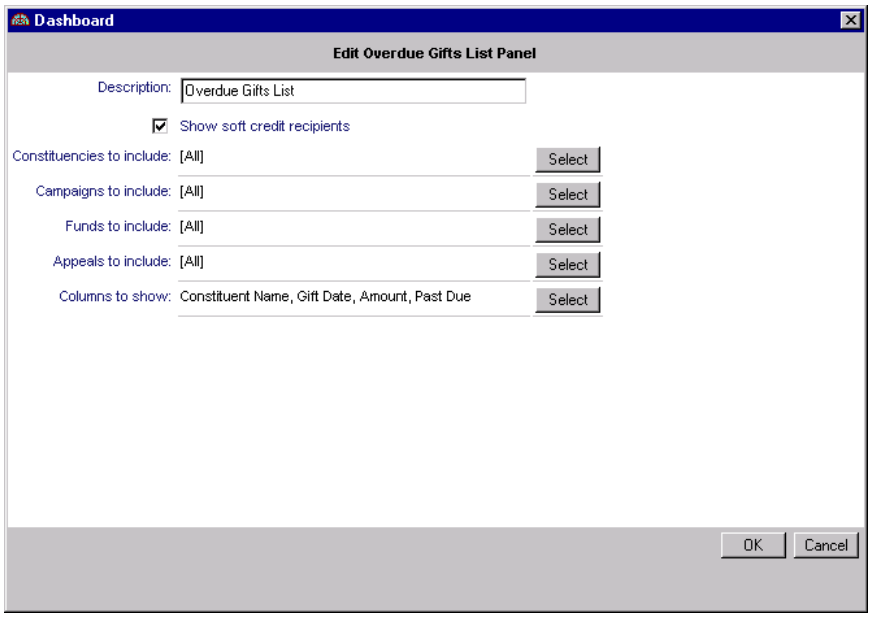


5. Click **OK**. You return to the Edit Overdue Gifts List Panel.
6. In the **Campaigns to include** row, click **Select**. The Selected Campaigns screen appears.

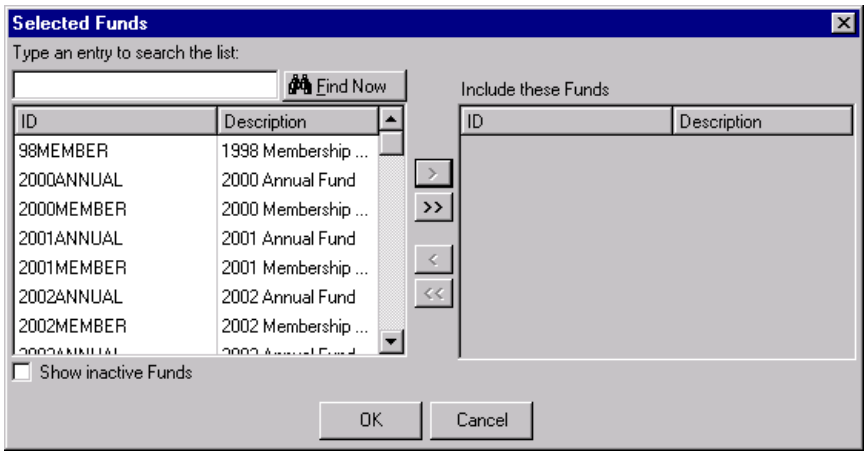


7. In the **Include these Campaigns** box, highlight Membership Campaign and click the single left arrow.

8. Click **OK**. You return to the Edit Overdue Gifts List Panel.

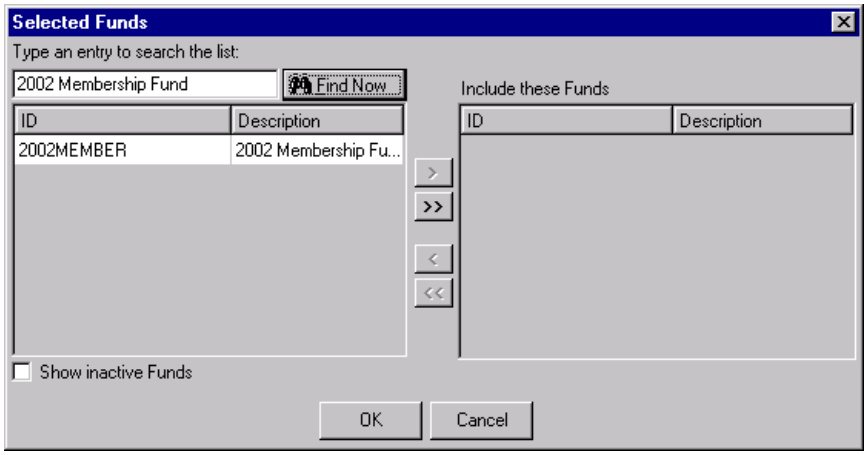


9. In the **Funds to Include** row, click **Select**. The Selected Funds screen appears.

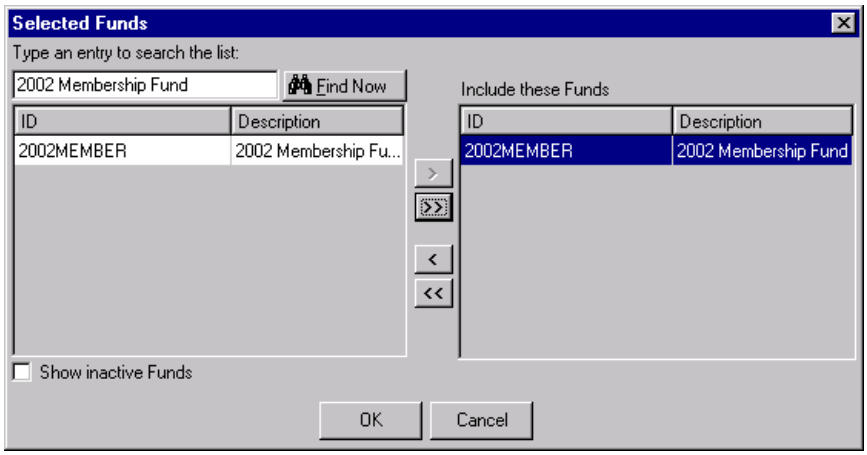


Note: When using the **Funds Now** field, do not include quotation marks in the field.

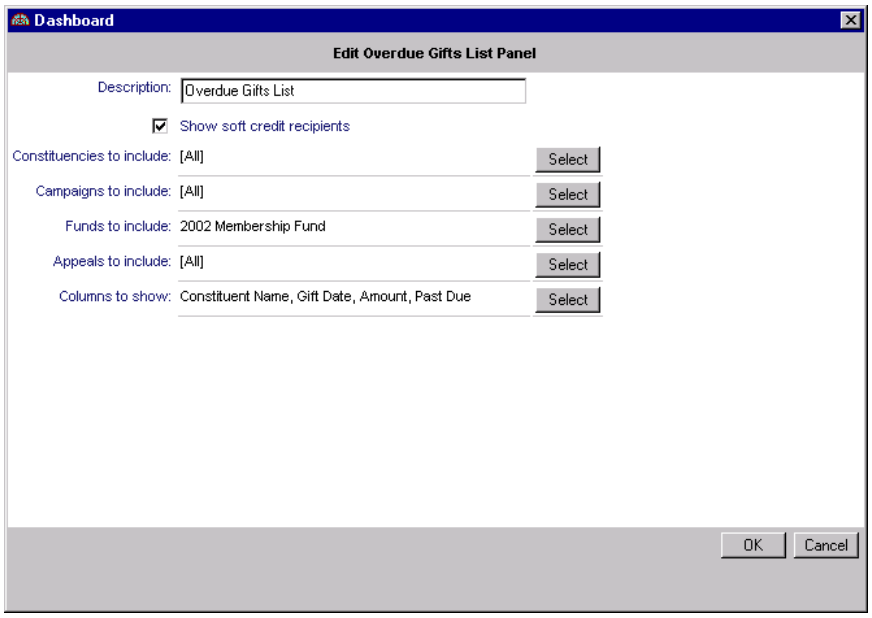
10. In the **Find Now** field, enter “2002 Membership Fund” and click **Find Now**. The 2002 Membership Fund appears in the box on the left.



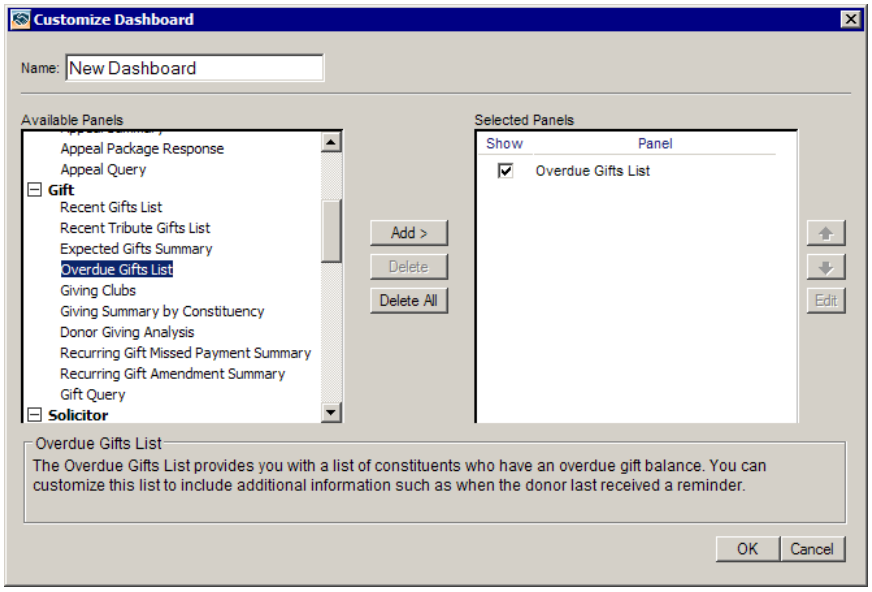
11. To include the 2002 Membership Fund in the **Include these Funds** box, highlight the fund and click the single right arrow. The 2002 Membership Fund moves to the **Include these Funds** box.



12. Click **OK**. You return to the Edit Overdue Gifts List Panel.



13. To save the summary changes to your Customize Dashboard panel, click **OK**. You return to the Customize Dashboard screen.



14. Click **OK**. You return to the Dashboard page. The Overdue Gifts List appears with your results.

Constituent Name	Gift Date	Amount	Past Due
Elizabeth A. Ashton	02/28/2002	$100.00	$60.00
RCS Corporation (Audrey I. Lorenz)	05/22/2002	$15,000.00	$9,000.00
Foreign Financial Group, Ltd. (Winston R. Tate)	07/04/2002	$450.00	$450.00
Toy World, Inc. (Nicole M. Dustin)	07/04/2002	$300.00	$300.00
Toy World, Inc. (Samantha K. Hart)	07/12/2002	$150.00	$150.00
Mark D. Adamson	11/18/2002	$100.00	$1,900.00
South Carolina Transportation Association (Anthony S. Ellis)	06/27/2002	$187.50	$187.50
South Carolina Transportation Association	07/06/2002	$187.50	$187.50

If you want to print the panel, click **Panel options** on the Overdue Gifts List Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Print**. For more information about Dashboard action bars, see “Dashboard Action Bars” on page 49. For more information about printing panels, see “Print a panel” on page 34.

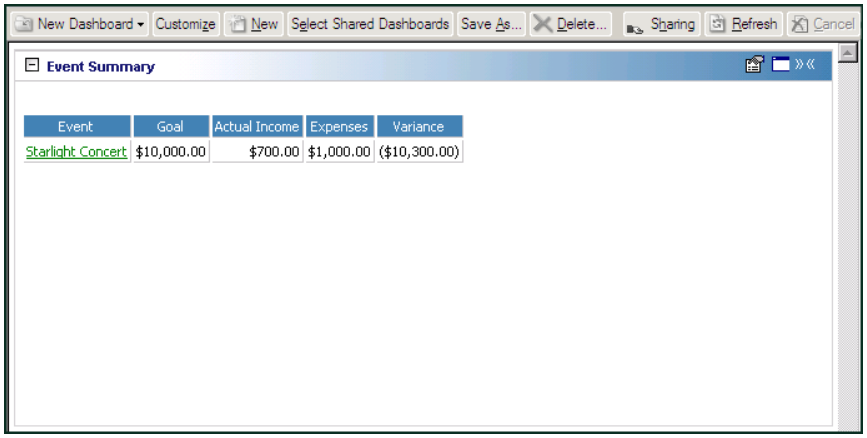
View or modify a record from panel results

From most *Dashboard* panels, you can open a record within ***The Raiser’s Edge*** to view or modify data on the record. For example, from an Appeal Summary, you can click an Appeal name to open that appeal record to view or make changes to the record. From the Recent Gifts List, you can open a gift record by clicking a gift date. For this example, we focus on the Event Summary.

Scenario: Your organization is preparing for the Starlight Concert. You just mailed 500 invitations to your most valuable constituents. You recently created the Event Summary in *Dashboard* to monitor the success of this event. From the Event Summary results panel, update the **No. Invited** field on the Starlight Concert event record to reflect the number of invitations mailed.

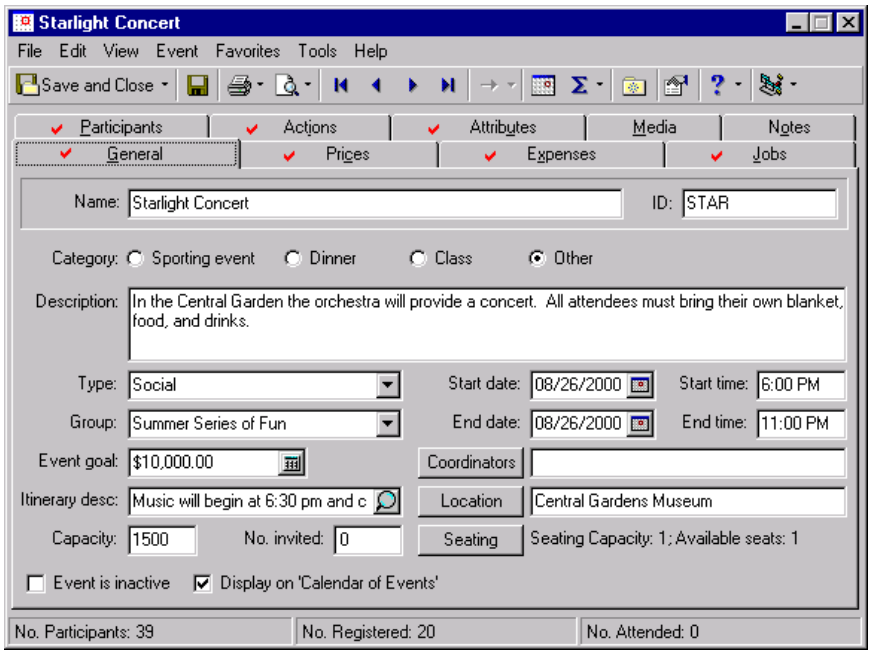
Warning: The Event Summary appears in *Dashboard* only if you use the optional module *Event Management*.

1. From the Dashboard page, click **Starlight Concert**. For more information about creating a Dashboard panel, see “Create a new Dashboard panel” on page 12. For more information about accessing the Dashboard page, see “Navigate in Dashboard” on page 45.

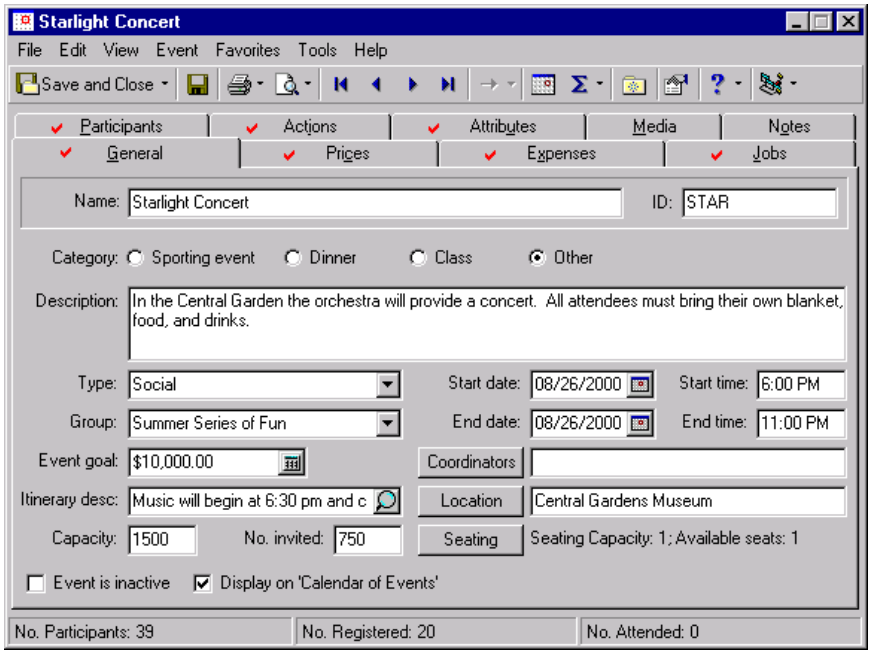


Event	Goal	Actual Income	Expenses	Variance
Starlight Concert	$10,000.00	$700.00	$1,000.00	($10,300.00)

The Starlight Concert event record opens.

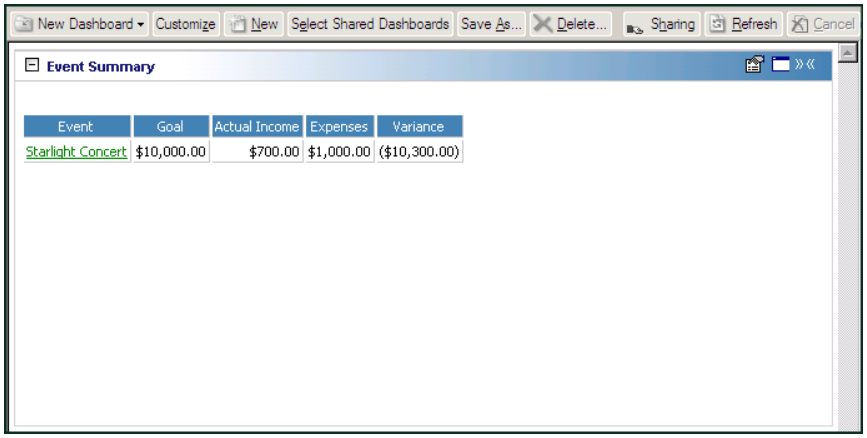


2. On the General tab, in the **No. Invited** field, enter “750”.



Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see “Dashboard Action Bars” on page 49.

3. To exit the Starlight Concert event record, click **Save and Close** on the toolbar. You return to the Dashboard page.



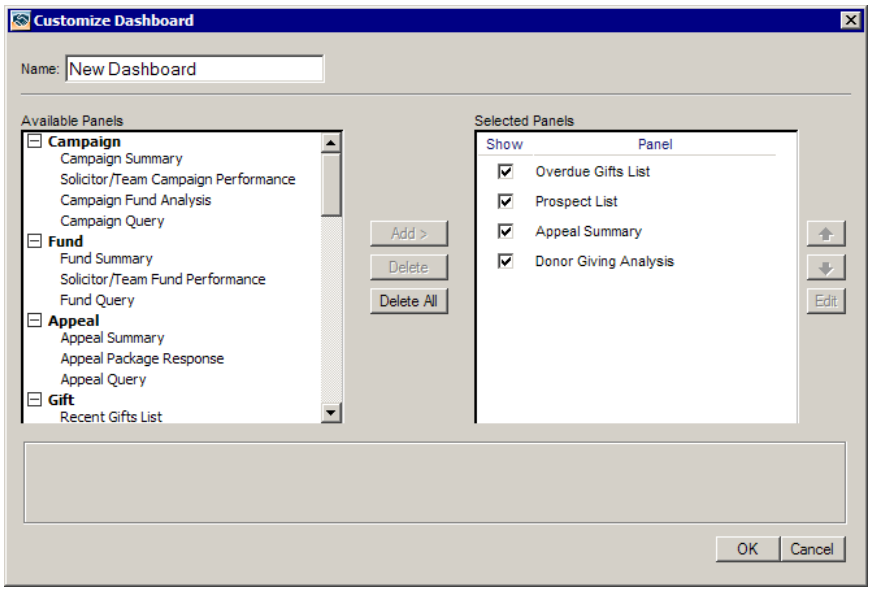
If you want to print the panel, click **Panel options** on the Event Summary panel action bar. A drop-down appears. From the drop-down, select **Print**. For more information about Dashboard action bars, see "Dashboard Action Bars" on page 49. For more information about printing panels, see "Print a panel" on page 34.

Hide a panel

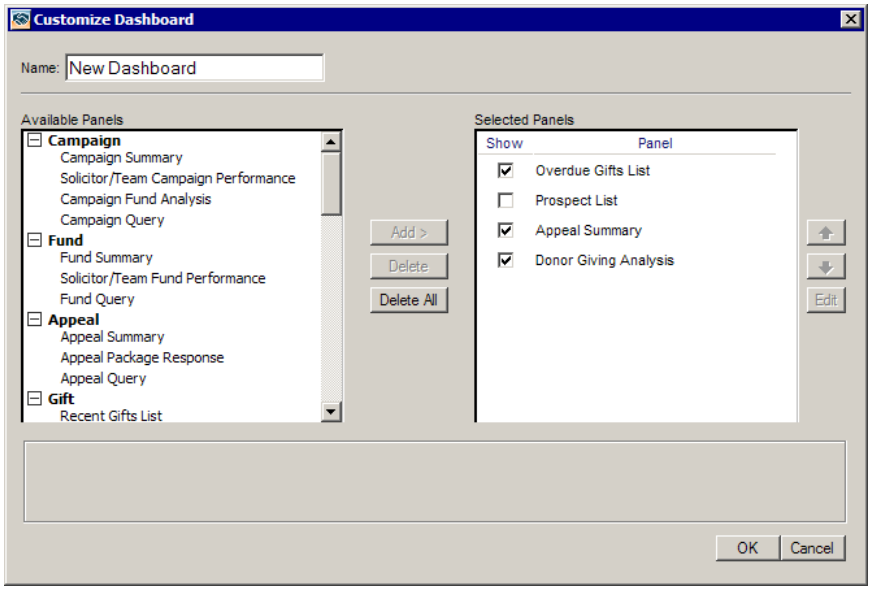
Instead of deleting a panel from the Customize Dashboard panel, you can hide the panel in the **Selected Panels** box. For example, on the Dashboard page, you currently display multiple panels, including the Appeal Summary. You need to process a new panel, and do not want to delete any existing panels from the **Selected Panels** box. You can hide the Appeal Summary so the information saves for future use. If you delete a panel from the Customize Dashboard panel, you must recreate the panel when you need it again. For this example, we focus on hiding the Appeal Summary.

Note: You can use the up and down arrows to the right of the **Selected Panels** box to sort your Dashboard panels.

1. From the Dashboard page, click **Customize** on the action bar. The Customize Dashboard panel appears. If you have not created a Dashboard panel, see "Create a new Dashboard panel" on page 12. For more information about accessing the Dashboard page, see "Navigate in Dashboard" on page 45.



2. In the **Selected Panels** box, a list of panels you created appears. Unmark **Show** next to the panel you want to hide. When you process the new Dashboard panel results, the panel does not display on the Dashboard page until you mark the **Show** checkbox again.



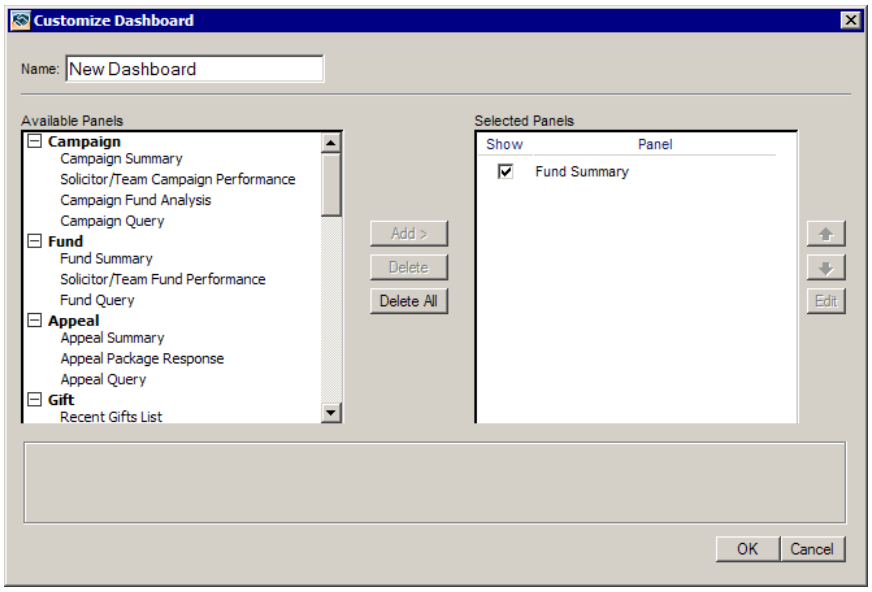
3. To start creating your new Dashboard panel, highlight the panel you need in the **Available Panels** box and click **Add**. For more information about creating a new panel, see “Create a new Dashboard panel” on page 12.

Graph and customize a panel

You can create a graph for the Campaign Summary, Fund Summary, Appeal Summary, Appeal Package Response, Expected Gifts Summary, Giving Clubs, Giving Summary by Constituency, and Solicitor Performance Graph in *Dashboard.* For this procedure, we focus on the Fund Summary.

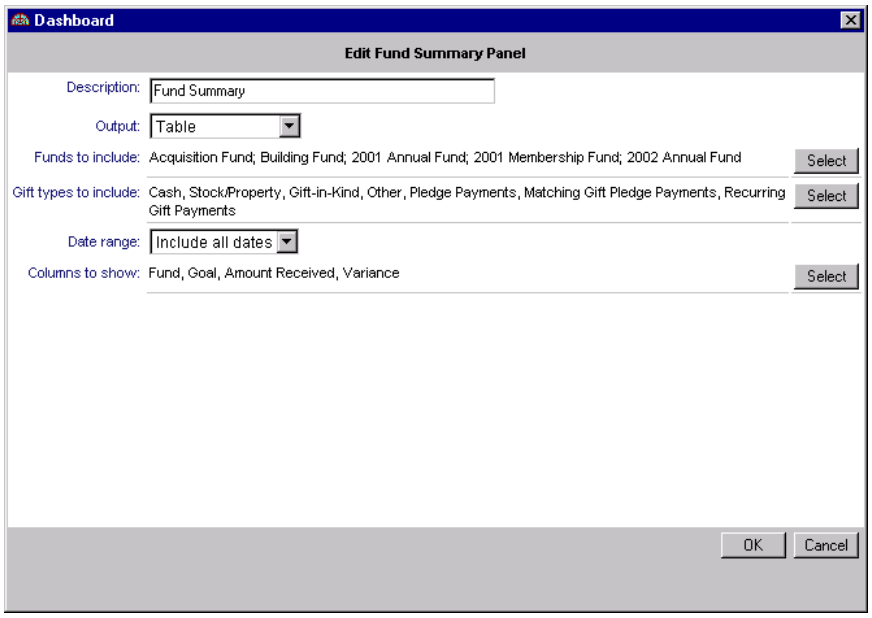
Scenario: You recently created the Fund Summary to compare and analyze the goals and amounts received for each of your major funds. Create and customize a graph of this Fund Summary to present at your next Board Member meeting.

1. From the Dashboard page, click **Customize** on the Dashboard page action bar. The Customize Dashboard panel appears. If you have not created a Dashboard panel, see “Create a new Dashboard panel” on page 12. For more information about accessing the Dashboard page, see “Navigate in Dashboard” on page 45.



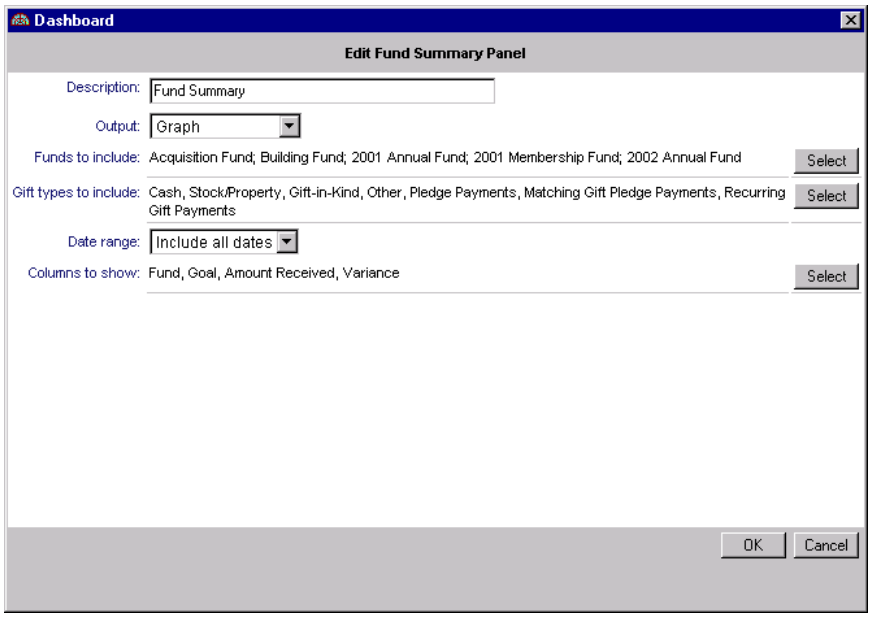
2. In the **Selected Panels** box, highlight the Fund Summary panel and click **Edit**.

The Edit Fund Summary Panel appears.



Note: To view both the table and graph on the Dashboard page, select "Table and Graph" in the **Output** field.

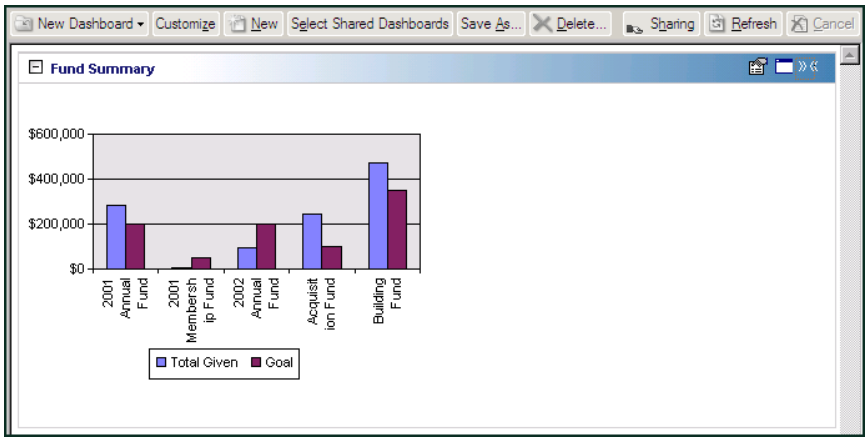
3. In the **Output** field, select "Graph".



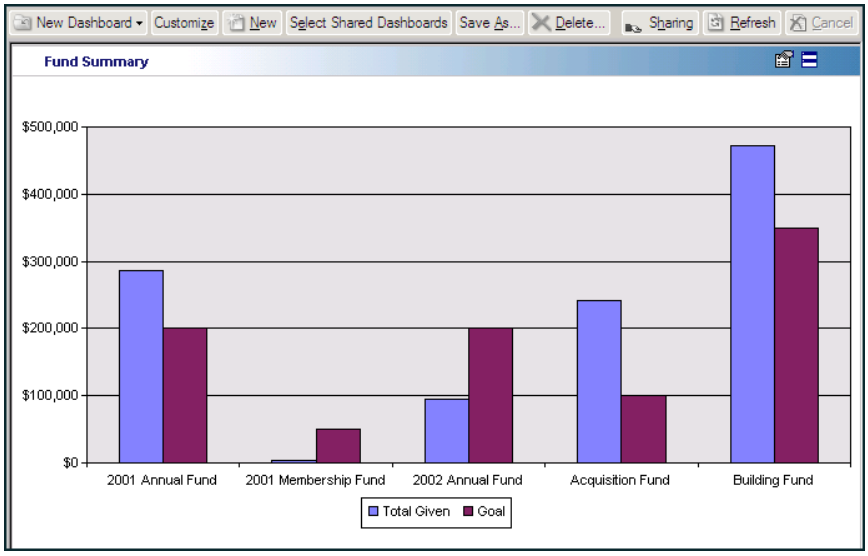
4. To save the changes to the Fund Summary, click **OK**. You return to the Customize Dashboard panel.

Note: You can create a graph for the Campaign Summary, Fund Summary, Appeal Summary, Appeal Package Response, Expected Gifts Summary, Giving Clubs, Giving Summary by Constituency, Solicitor Performance Graph, and Active Membership List Dashboard panels.

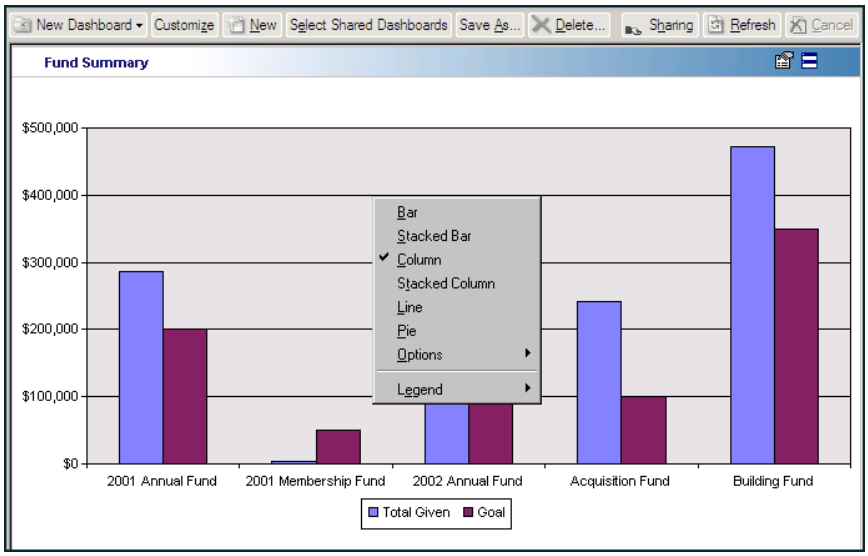
5. To process the graph, click **OK**. The results appear on the Dashboard page.



6. To customize the graph, you must first maximize the graph. To do this, double click the Fund Summary panel results or click **Zoom Panel** on the Dashboard panel action bar. The maximized graph displays.

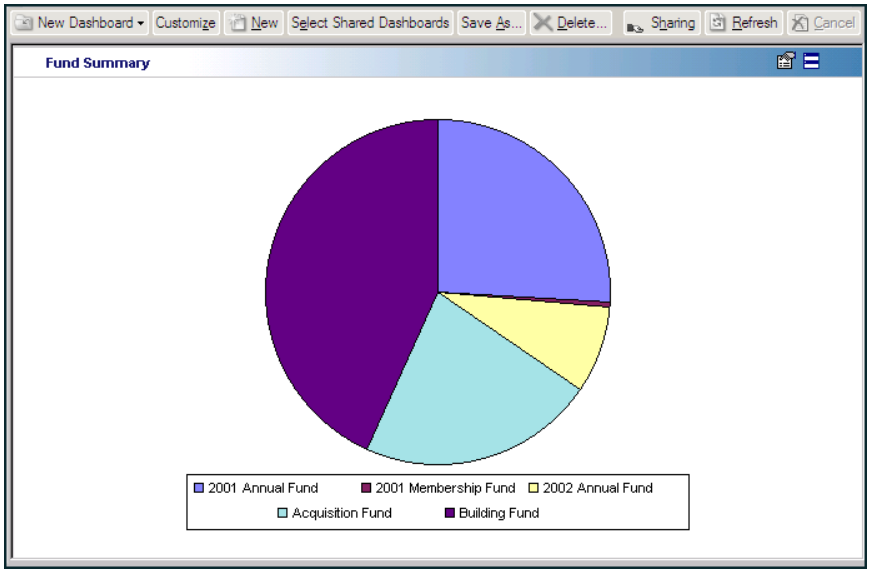


7. Right-click over the Fund Summary panel results. A right-click menu appears for customizable options.

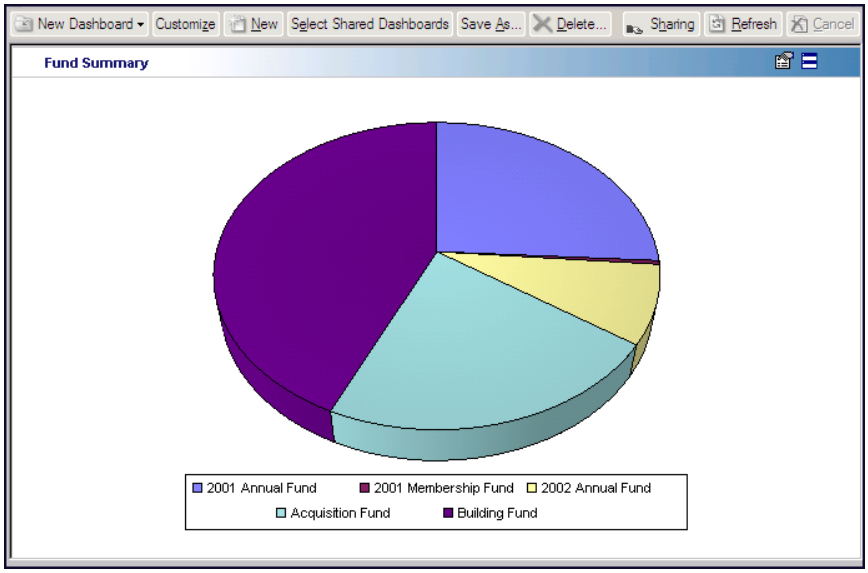


Note: You can hover your mouse over parts of the pie graph to view the fund name, the amount of money raised per fund, and the percentage in comparison with the entire pie graph.

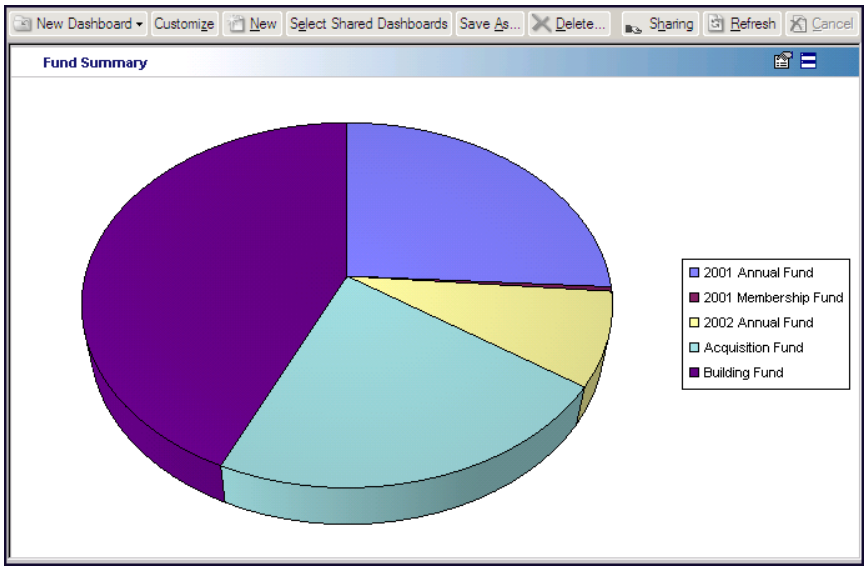
8. From the right-click menu, select **Pie**. A pie graph of your Fund Summary panel results displays.



9. To display your graph in 3D, select **Options**, **Show in 3D** from the right-click menu. The 3D graph panel results displays automatically on the Dashboard page.



10. To move the legend to the right of the 3D pie graph, select **Legend**, **Align Right** from the right-click menu. The legend appears automatically to the right of the pie graph on the Dashboard page.



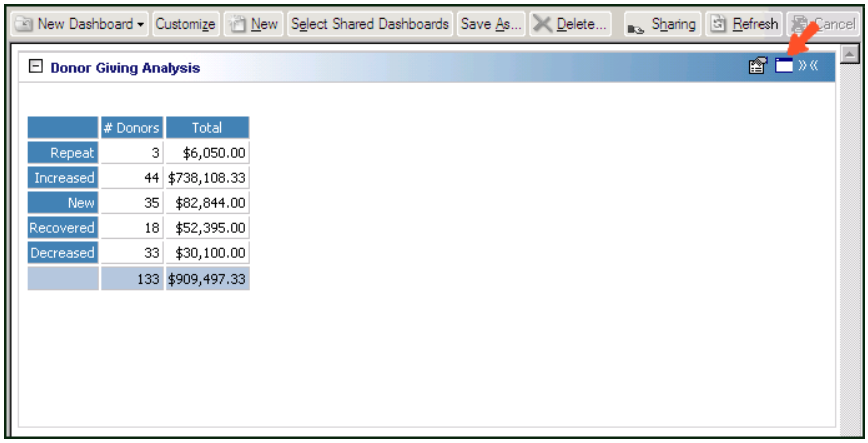
If you want to print the graph, click **Panel options** on the Fund Summary panel action bar. A drop-down appears. From the drop-down, select **Print**. For more information about Dashboard action bars, see “Dashboard Action Bars” on page 49. For more information about printing panels, see “Print a panel” on page 34.

Print a panel

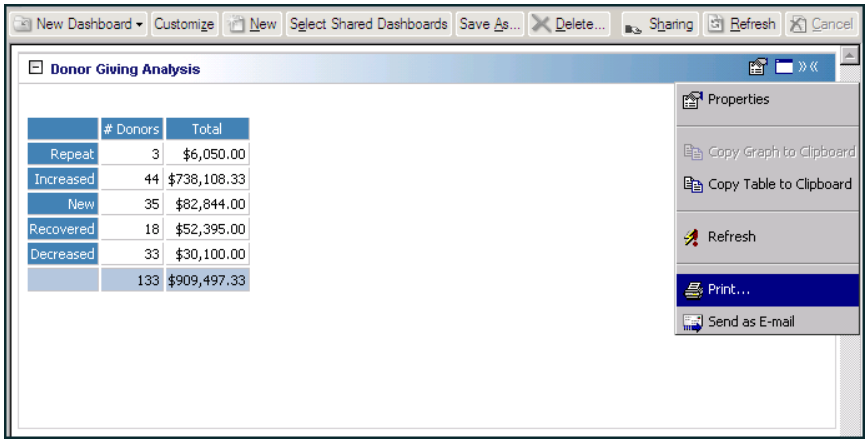
You can print a Dashboard panel from the Dashboard page. For example, You recently created the Solicitor Status panel and need to take a copy of this for the next solicitor meeting. You can print a copy of this from the Solicitor Status panel results. For this procedure, we focus on the Solicitor Status panel.

Note: For more information about Dashboard action bars, see “Dashboard Action Bars” on page 49.

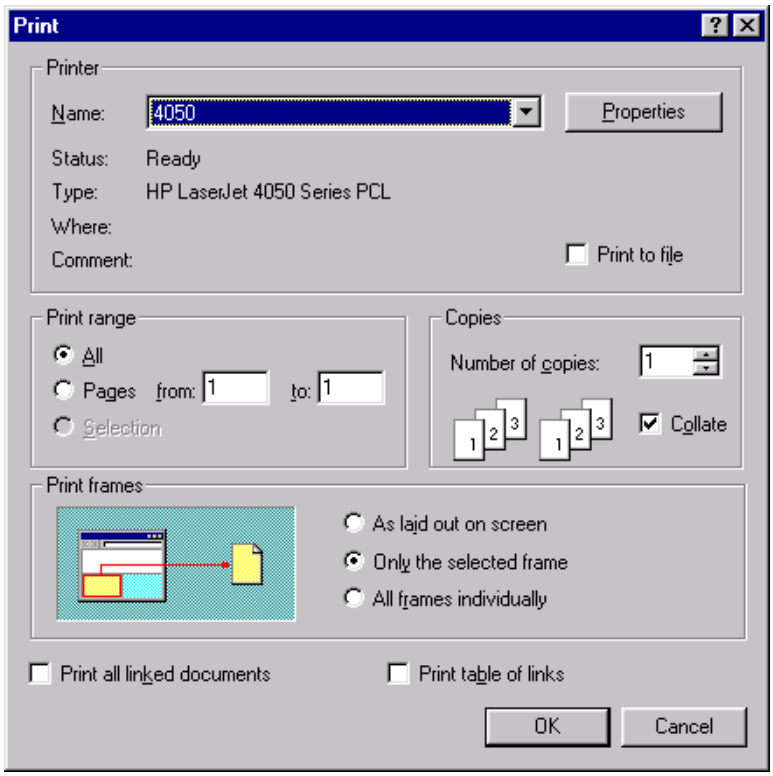
1. From a panel that displays on the Dashboard page, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. For more information about Dashboard action bars, “Dashboard Action Bars” on page 49. If you have not created a Dashboard panel, see “Create a new Dashboard panel” on page 12.



2. Select **Print** from the menu.



Your Print screen appears.



3. In the **Name** field, select the printer you need.
4. To print the panel, click **OK**.

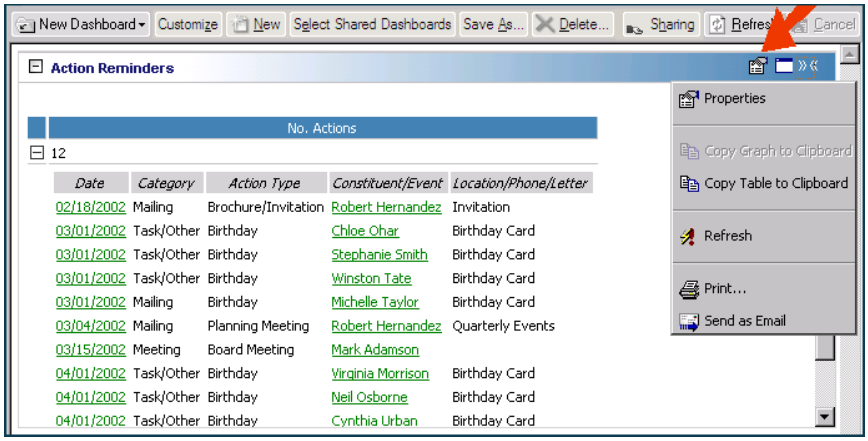
Send a panel as email

You can send a *Dashboard* panel as email directly from the panel results on the Dashboard page. For this procedure, we focus on the Action Reminders panel.

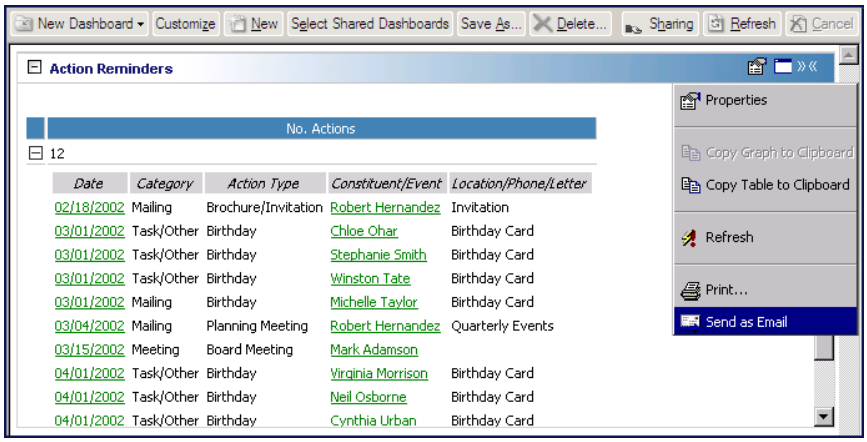
Scenario: Your Development Director is out of the office today, but working from home. He wants to know what is on his upcoming agenda, and requests that you send his Action Reminders panel in an email to his house so he can plan accordingly. You maintain an Action Reminders panel for him on your own Dashboard page. Send the requested information by email.

Note: For more information about Dashboard action bars, see “Dashboard Action Bars” on page 49.

1. From the Dashboard page, click **Panel options** on the Action Reminders panel action bar. A drop-down menu appears. For more information about Dashboard action bars, see “Dashboard Action Bars” on page 49. If you have not created a Dashboard panel, see “Create a new Dashboard panel” on page 12.

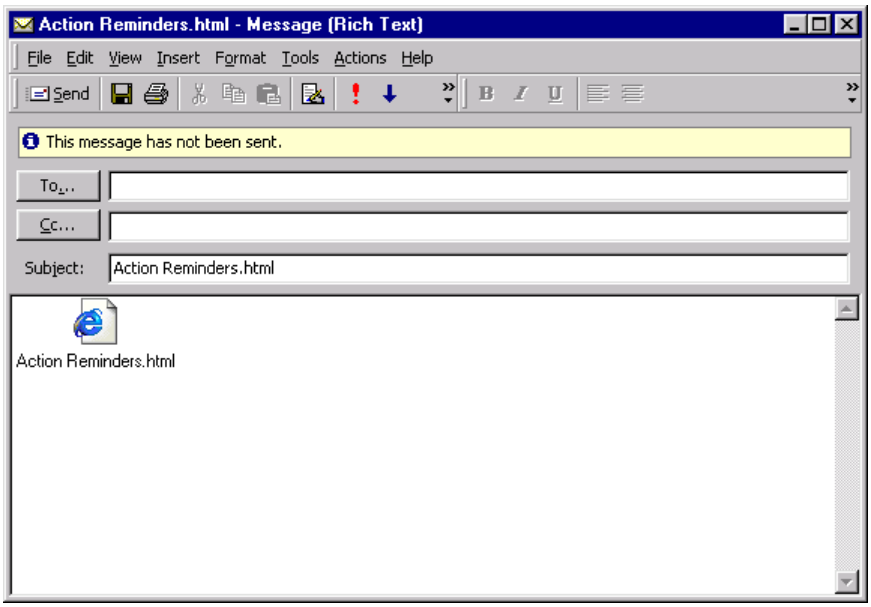


2. From the menu, select **Send as Email**. For more information about accessing the Dashboard page, see “Navigate in Dashboard” on page 45.



Warning: ***The Raiser’s Edg***e is compliant only with MAPI email software, such as *Microsoft Outlook*.

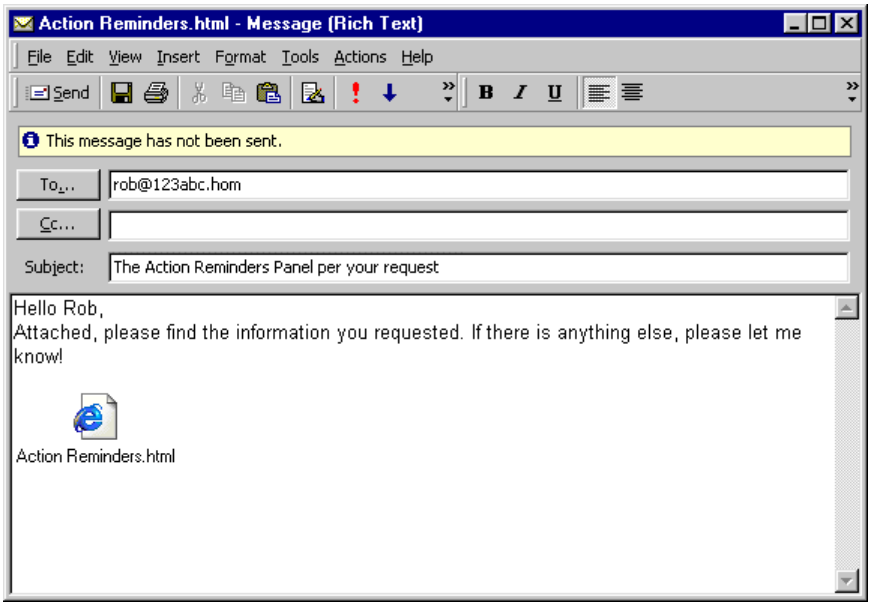
Your email screen appears.



3. In the **To** field, enter the home email address for the Development Director.
4. Leave the **Cc** field blank because there are no requests to send this to another individual.

Note: Any Dashboard panels you send via email are sent as a .html file.

5. In the **Subject** field, remove the default information and enter “The Action Reminders panel per your request”.
6. In the message box of the email, enter any text you want to appear with the Dashboard panel results.



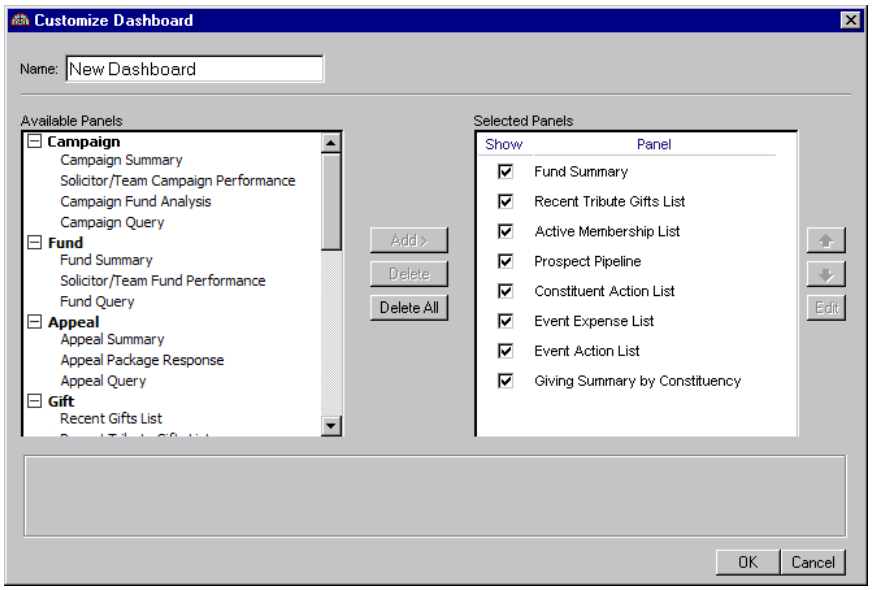
7. Click **Send**. The email is sent to any address you list in the **To** field.

Delete a panel

You can delete a *Dashboard* panel from the Customize Dashboard panel that you no longer need. For example, you recently created the Appeal Summary to view information for the Planned Giving Letter, Millennium Direct Mailing, and the Celebrity Auction. You no longer need this information, so you can delete the panels from your Dashboard page.

Warning: Once you delete a panel, you cannot retrieve the information. We recommend you write down filter and output information in case you want to create the panel again in the future. If you want to hide a panel instead of deleting one, see "Hide a panel" on page 28.

1. From the Dashboard page, click **Customize** on the Dashboard page action bar. The Customize Dashboard panel appears. If you have not created a Dashboard panel, see "Create a new Dashboard panel" on page 12. For more information about accessing the Dashboard page, see "Navigate in Dashboard" on page 45.

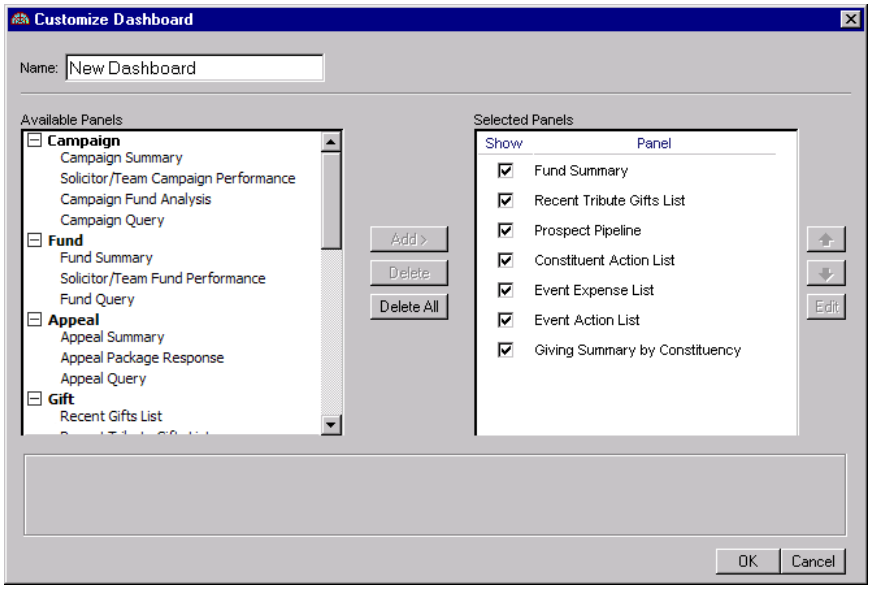


Tip: To delete all Dashboard panels in the **Selected Panels** box at once, click **Delete All** on the Customize Dashboard panel.

2. Highlight the panel you want to delete in the **Selected Panels** box and click **Delete**. A message appears.

If you do not want this message to appear the next time you delete a Dashboard panel, mark **Do not show this message again**.

3. Click **Yes**. You return to the Customize Dashboard panel. The Appeal Summary is permanently deleted from the **Selected Panels** box.



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Warning: Before using *Dashboard*, you must install Microsoft *Office* Web components. For more information, see ***The Raiser's Edge*** *Installation Guide*.

As part of ***The Raiser's Edge 7***, *Dashboard* provides a quick and efficient overview of information in your database in an organized presentation. On the Dashboard page, with the click of a mouse, you can view a real-time snapshot of your organization's progress. You can create up to up to 255 panels of summarized information on the Dashboard page to track the progress or performance of your organization's campaigns, funds, appeals, gifts, solicitors, memberships, events, proposals, volunteers, or actions. From most *Dashboard* summaries, you can open a record within ***The Raiser's Edge*** to view or modify data on the record.

Note: You can create tribute, event, proposal, membership, planned giving or volunteer *Dashboard* panels if you use the optional modules *Honor/Memorial Tracking*, *Event Management*, *Prospect Research Management*, *Membership Management*, *PlannedGift Tracker* or *Volunteer Management,* respectively.

Dashboard is ideal for development directors, executives, or any user who needs to quickly access data. Because *Dashboard* does not require a complete working knowledge of ***The Raiser's Edge***, it is convenient for infrequent users. The panels on the Dashboard page automatically save and display until you remove or replace them with a new panel. You can also edit a panel to view different information or refresh data at any time. You can print all panels and you can select to view a graph or table (or both) for the Campaign Summary, Fund Summary, Appeal Summary, Appeal Package Response, Expected Gifts Summary, Giving Clubs, Giving Summary by Constituency, and the Active Membership List. The Solicitor Performance Graph automatically graphs results on the Dashboard page.

Frequently Used Terms

This section defines words and phrases you need to know as you work with the *Dashboard Guide*. If you come across an unfamiliar term when reading this or any book in ***The Raiser's Edge*** documentation, make sure you check the online glossary in the help file.

Columns to Show. Any fields you select from the **Columns to Show** filter appear on the panel results for viewing purposes. For example, in the Recent Gifts List, you want to view the appeal name and constituent code as the output for your summary. You can select these two fields from the **Columns to Show** filter.

Dashboard. Quickly and effortlessly, *Dashboard* summarizes your organization's most valuable information. A Dashboard page contains up to 255 panels of summaries, lists, and graphs that efficiently compare and analyze your data. You can create a wide variety of Dashboard panels on the Dashboard page. You can display all different types of panels, all the same panels, or a combination of both. For example, you can display the Fund Summary, Appeal Package Response, Constituent Action List, along with four Solicitor Performance Graphs.

In *Dashboard*, you can also create an unlimited number of Dashboard pages. For example, you can create a Dashboard page for Gift panels, a second Dashboard page for Solicitor panels, and a third Dashboard page for Action panels.

Dashboard page. A Dashboard page stores all Dashboard panels you select on the Customize Dashboard panel. You can create an unlimited amount of Dashboard pages in *Dashboard*. These pages display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard in the **Dashboard** field on the Dashboard action bar.

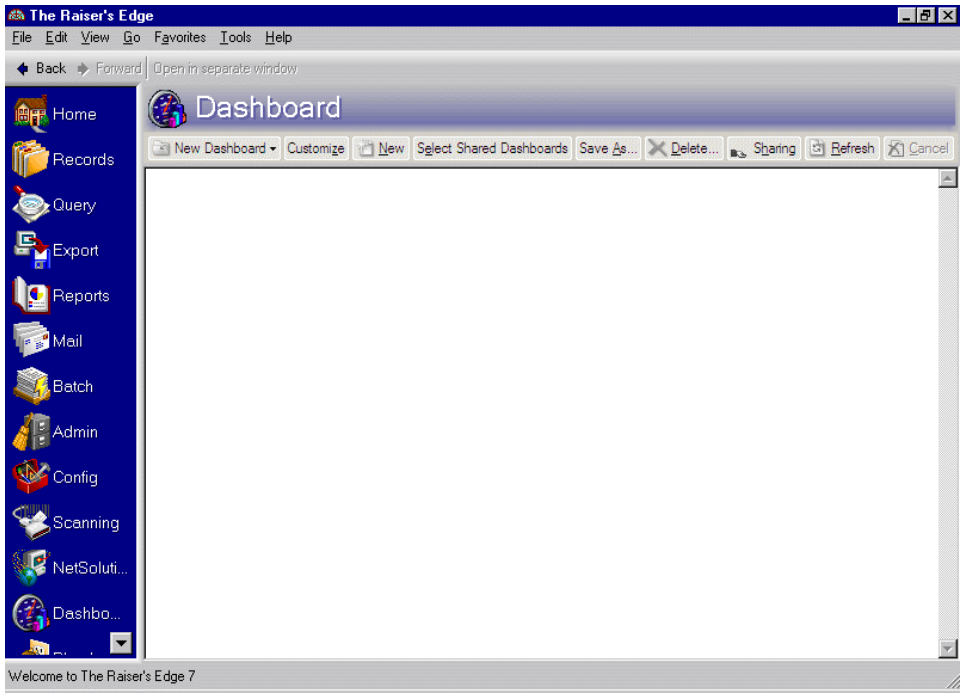
Master pledge. A master pledge is a gift record containing the gift amount a constituent agrees to donate and the installment schedule for the pledge payments. You create a master pledge by selecting Pledge in the **Gift type** field on a gift record. For example, Susan McDonald pledges to donate $100 to your organization. She wants to pay this pledge in two installments due on June 1 and July 1. To record Susan's gift in your database, you need to create a new gift record with a gift type of Pledge. On the Installments/Payments tab of this gift record, enter the installment schedule Susan plans to use to pay her pledge.

Panel. A panel is a block of information on the Dashboard page that contains the summary, list, and graph information you select in *Dashboard*. The Dashboard page contains up to 255 panels based on the selections you make in the Customize Dashboard panel.

Other "screens" you use to select the summaries, lists, graphs, and filters in *Dashboard* are also referred to as panels. For example, when you edit the Appeal Summary, you make your changes on the Edit Appeal Summary Panel.

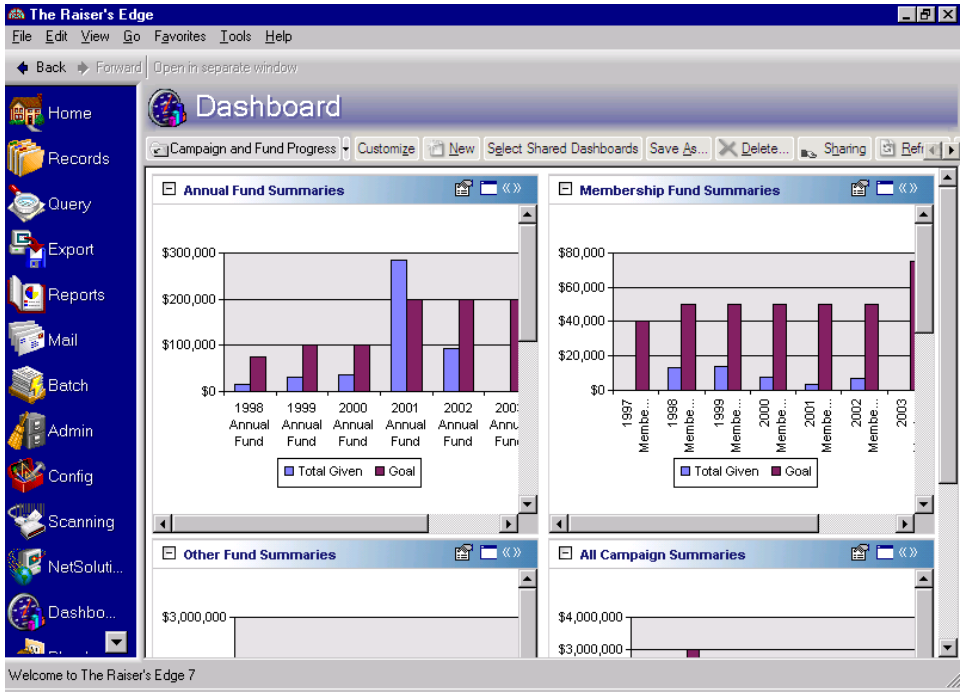
Navigate in Dashboard

To access the Dashboard page, click **Dashboard** on the Raiser's Edge bar. From the Dashboard page, you can create new Dashboard panels by clicking **Customize** on the Dashboard page action bar. You can set up Campaign, Fund, Appeal, Gift, Solicitor, Membership, Event, Proposal, Volunteer, Action, and NetSolutions panels.



Warning: To access *Dashboard*, you must have rights established from the **Security** link of *Administration*.

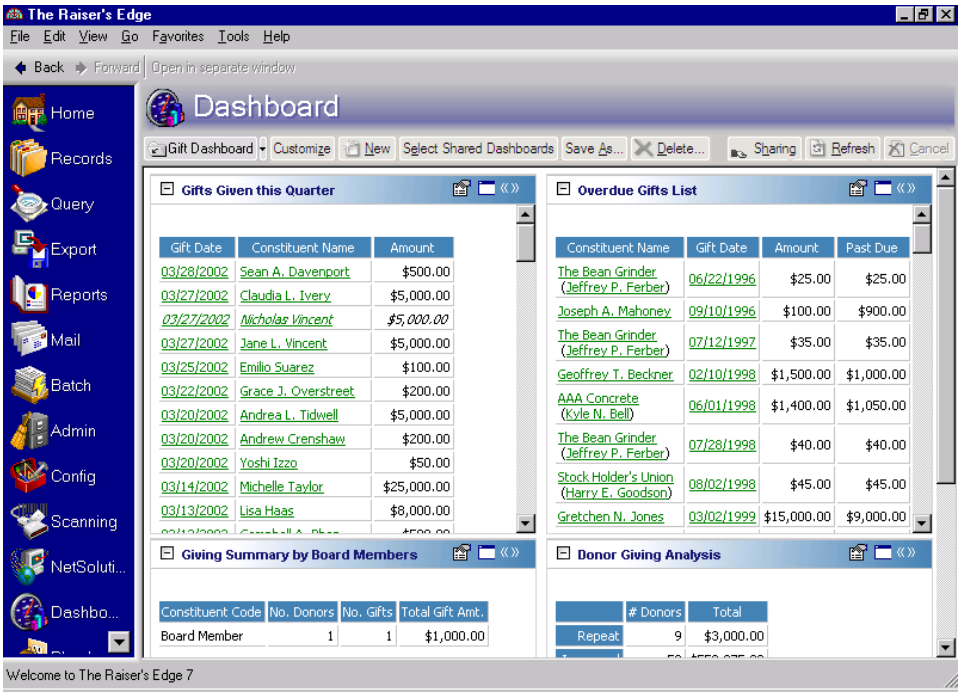
The Dashboard page contains up to 255 panels depending on how many summaries, lists, or graphs you select on the Customize Dashboard panel. These panels contain the summarized information you select on the Edit Panel screens.



Note: You can use the buttons on the individual panel action bar to expand and collapse a panel. For more information, see “Dashboard Action Bars” on page 49.

You can process the same panel as many times as you need. For example, you can process the Constituent Action List 20 times for your 20 top donors.

Even though up to 255 panels can display on the Dashboard page, you can still create an unlimited amount of Dashboard pages. For example, you can create a Dashboard page for Gift panels, a second Dashboard page for Solicitor panels, and a third Dashboard page for Action panels.These pages display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar.



Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard in the **Dashboard** field on the action bar.

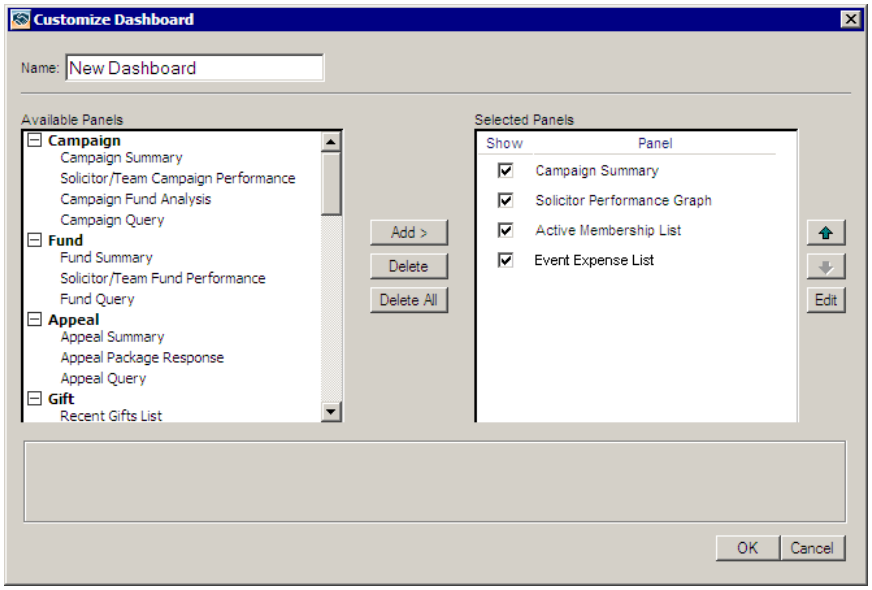
Access a Summary

Once you add a panel to the Dashboard page, you can access the Edit Panel screen using the drop-down menu from the panel action bar. For more information about creating new panels, see "Create a new Dashboard panel" on page 12.

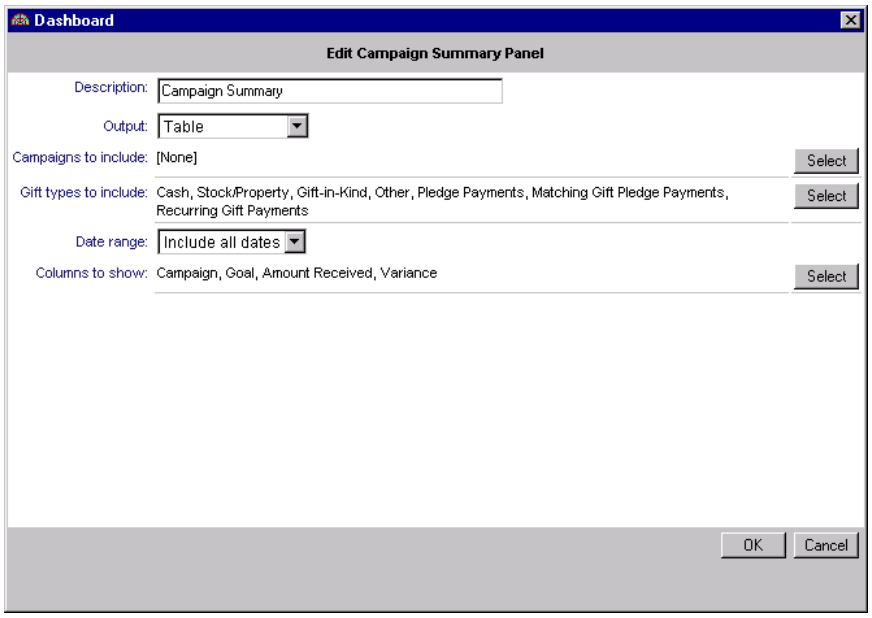
- **Open an existing panel from the Dashboard page**
  1. On the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears.

Note: You can use the up and down arrows to the right of the **Selected Panels** box to sort your Dashboard panels.

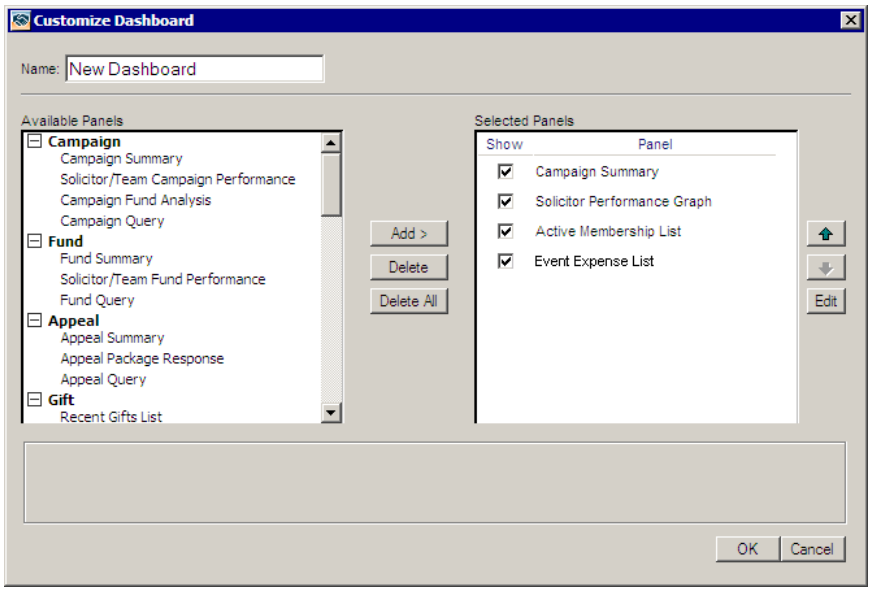
2. On the Dashboard page action bar, click **Customize**. The Customize Dashboard panel appears. For more information about *Dashboard* action bars, see "Dashboard Action Bars" on page 49.



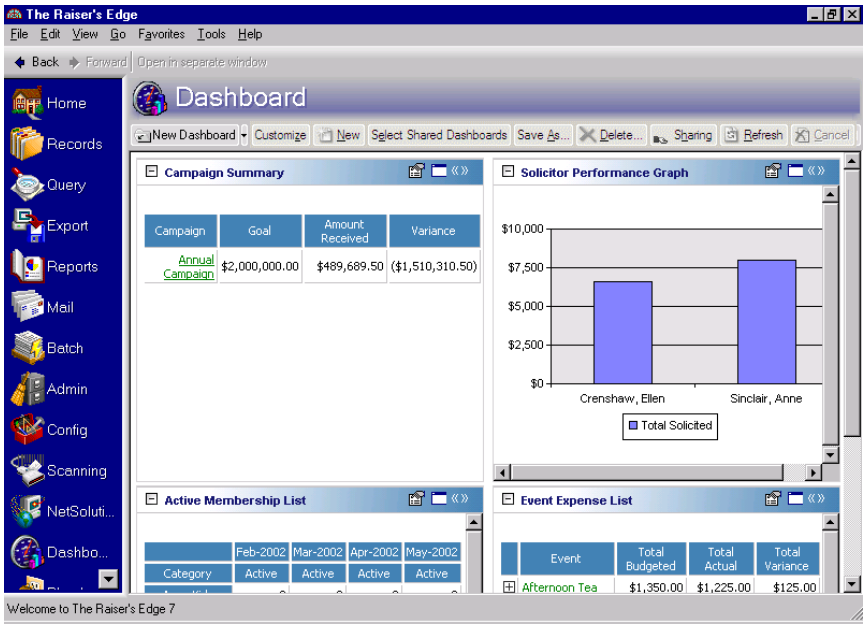
3. In the **Selected Panels** box, highlight the panel you want to access, and click **Edit**.The Edit Panel appears.



4. Make your changes and click **OK**. You return to the Customize Dashboard page.



5. Click **OK**. The summary processes again, and displays on the Dashboard page.



Dashboard Action Bars

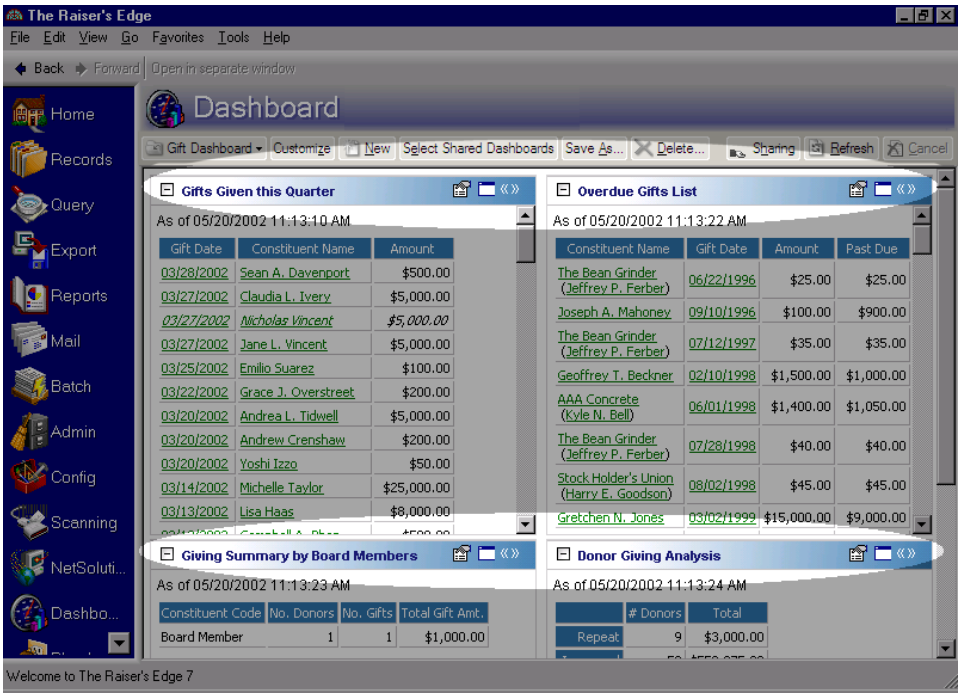
Dashboard action bars contain common commands for a panel. By clicking these links, you can easily perform a process, such as refreshing, to save time when working with a panel.

Dashboard Page Action Bar

You can perform several tasks from the Dashboard page action bar. Links on the action bar provide ways to make changes to the entire Dashboard page you have selected in the **Dashboard** field. You create, share, save, delete, refresh, and cancel a Dashboard page from this action bar. By clicking **Customize**, you can create Dashboard panels to display on the Dashboard page.

Dashboard Panel Action Bar

Using the buttons on a Dashboard panel action bar, you can copy, print, collapse, and expand individual panels.

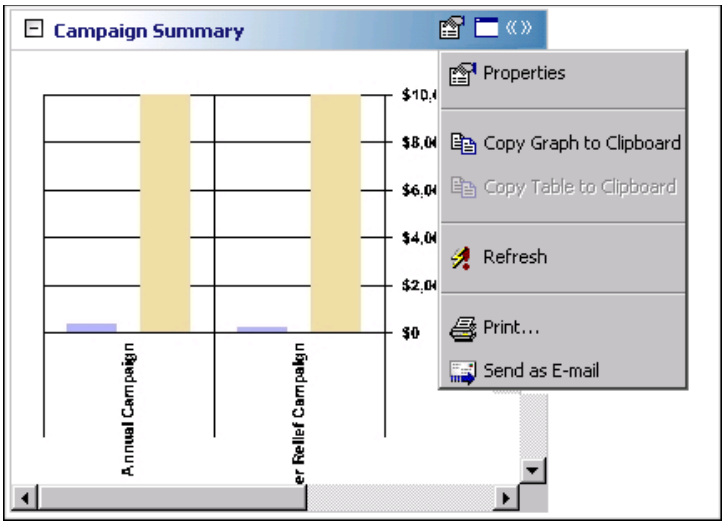


Note: Tooltips in *Dashboard* appear automatically when you move your cursor across each item on the action bar. Tooltips, such as **Collapse panel**, explain the function of each action bar icon.

If you want to collapse an individual panel so the Dashboard panel action bar is visible only, click **Collapse panel**.

To restore the panel to normal size, click **Collapse panel** again. This button now has a "**+**" in the square when the panel is in collapsed form.

When you click **Panel options** on the panel action bar, a drop-down menu appears.



Tip: To quickly change a filter for a panel, select **Properties** from the drop-down menu. The Edit Panel appears so you can make the changes you need.

From this drop-down menu, you can select to view the properties, copy, refresh, print, or send the individual panel as an email.

To maximize an individual panel to full screen width, click **Zoom panel** on the Dashboard panel action bar.

To restore the panel to normal size, click **Zoom panel** again.

To maximize an individual panel across the width of the Dashboard page, click **Expand panel** on the far right of the Dashboard panel action bar.

To restore the panel to normal size, click **Expand panel** again.

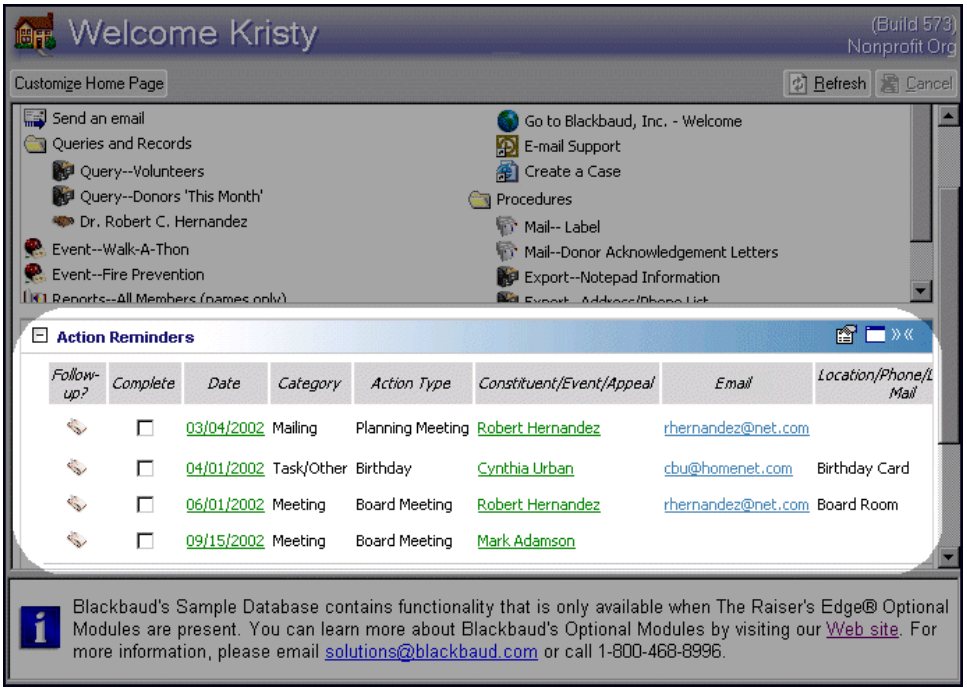
Security

Warning: To access *Dashboard*, you must have rights established from the **Security** link of *Administration*.

The security settings you establish in *Administration* apply to *Dashboard*. For example, if you prohibit your volunteers from viewing a certain campaign or constituent record in **Security**, they will not be able to view this information in *Dashboard*. For more information about Security, see the Security chapter of the *Configuration & Security Guide*.

Dashboard Panels on the Home Page

Dashboard panels display a real-time snapshot of you and your organization's progress. For your convenience, you can display your most frequently used panels on your Home page. For example, to show your action reminders on a daily basis, display the Action Reminders Dashboard panel. Select the Action Reminders panel on the Home tab in User Options. To access User Options, click **Customize** on the Home page action bar.



The Dashboard panels you choose to display on your Home page are separate from the panels you choose to display on the Dashboard page. For example, if you display the Donor Giving Analysis on the Dashboard page, it does not automatically appear on your Home page. To display the panel on your Home page, you must create it from the Home tab of the Options screen of User Options. For more information about Home page User Options, see the *Program Basics Guide*.

Gift Information

Many *Dashboard* panels use gift record information. In certain circumstances, such as soft credits or matching gifts, it is important you understand how *Dashboard* uses the information in each summary. For example, if you choose to include soft credits, any soft credit's name appears in italics in the panel results on the Dashboard page. To completely understand results for your Dashboard gift summaries, you should familiarize yourself with the information in this section. For more information about basic gifts, see the *Gift Records Guide*.

Gift Types

Below is a table of the gift types in *Dashboard*, and their gift type equivalents from the gift record.

Dashboard **Gift type**	***The Raiser's Edge*** **Gift type**
Cash	Cash
Pledge	Pledge
Matching Gift Pledge	Matching Gift Pledge
Stock/Property	Stock/Property (sold and unsold)
Gift-in-Kind	Gift-in-Kind
Planned Gift	Planned Gift
Other	Other
Pledge Payments	PP-Cash, PP-Stock/Property (sold and unsold), PP-Gift-in-Kind, PP-Other
MG Pledge Payments	MG PP-Cash, MG PP-Stock/Property (sold and unsold), MG PP Gift-in-Kind, MG PP-Other
Recurring Gifts	Recurring Gifts
Recurring Gift Payments	Cash gifts applied to Recurring Gifts

Pledge Payments and Matching Gift Pledge Payments

Pledge Payments and Matching Gift Pledge Payments include specific payment types depending on other gift types you select for your results. For example, if you create the Solicitor Status and you select Cash and Pledge Payments in the **Gifts types to include** row, only the gift types of Cash and Pledge Payment Cash display in the results panel. If you select only Pledge Payments in the **Gifts types to include** row, all pledge payment gifts types display in the results panel.

Matching Gift Pledge Payments calculate the same way as regular Pledge Payments in *Dashboard*.

Stock/Property Gifts

In *Dashboard*, panels that process Stock/Property gifts calculate the difference between the **Sale amount** field and the **Broker fee** field. This applies only if the stock has been sold and information has been entered on the Stock/Property Information screen in the gift record. For example, you add a stock gift with a **Value** of $200 on the Gift tab on a gift record. The next week, you sell the stock for $255. The brokerage fee is $75, and you enter this information on the Sold Stock/Property Information screen. A *Dashboard* panel displays $180 for this gift record. However, if the stock has not been sold, the amount in the **Value** field on the Gift tab displays in the panel on the Dashboard page.

Soft Credits

Warning: It is important to remember if you mark **Show Soft Credit recipients?**, totals in your panel results will inflate because individual amounts for the donor and the soft credit recipient are included.

If you mark the **Show Soft Credit recipients?** checkbox, the donor receives full credit for the gift amount. The soft credit recipient receives credit for the gift amount in the **Amount** column on the Soft Credit tab of the gift record. In the results panel on the Dashboard page, soft credits display in italics.

If you do not mark the **Show Soft Credit recipients?** checkbox, the gift amounts list only under the original donor, and all other additional information does not list.

Matching Gifts

When processing summaries using *Dashboard*, all matching gift pledges are credited to the matching gift company. For example, if Lucy Avdeenko donates a gift for $500 and RCS Corporation matches this gift 2-to-1, RCS Corporation is automatically credited the full gift amount of $1,000.

Planned Gifts

With *PlannedGiftTracker*, you can select to process gift records with a gift type of Planned Gift in many Dashboard panels. The following table is a list of Dashboard panels that *do not* include Planned Gift records.

Campaign Summary	Fund Summary
Appeal Summary	Expected Gifts Summary
Overdue Gifts List	Recurring Gift Missed Payments Summary
Recurring Gift Amendment Summary	

Write-Offs

When you create a summary that uses campaign, fund, and appeal filters, any write-offs toward pledges are included if the write-off is in the date range (such as This week or Last fiscal yr) you use for your filters. Write-offs always reduce the balance of a pledge, but do not affect the original pledge amount. Write-offs are not included in payment information.

Constituent Codes

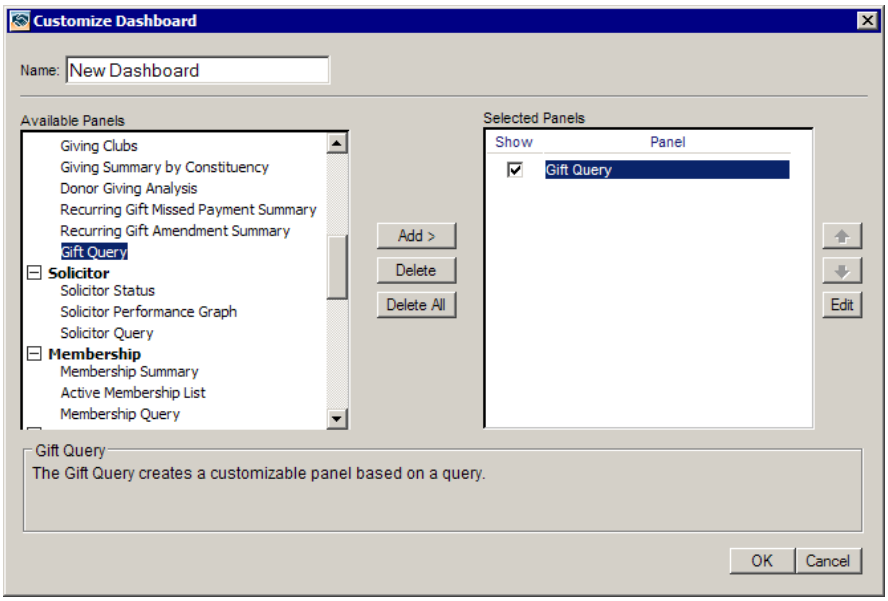
When you filter constituent information in *Dashboard*, constituent codes are pulled from the Bio 2 tab of the constituent record. If a constituent has multiple constituent codes, only the first one listed on the Bio 2 tab is considered for any Dashboard panel that contains constituent code information. It is important you keep this in mind when you create a panel. Constituent code information is *not* pulled from the gift record.

Dashboard Panels

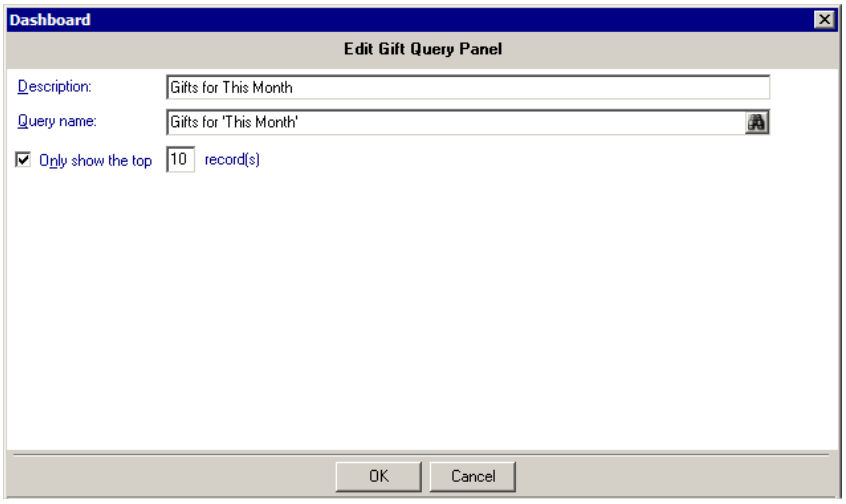
With ease and flexibility, you can process up to 255 panels of important information in *Dashboard*. The Dashboard panels can be used to plan, organize, or analyze many areas of your organization — from funds to events, to solicitors and gifts. Each panel is described in detail in this section.

Query

A query dashboard panel exists for each dashboard type. For example, the **Gift** dashboard panel list contains a Gift Query dashboard panel.



Use this panel to display the results of a query on your Dashboard page. When you create this panel, you select the query to use for the dashboard. You can also select to display a specific number of records on the dashboard panel.



The columns that appear on the dashboard panel are the fields on the query Output tab. The sort order for the dashboard is the sort order selected on the query Sort tab. For information about *Query*, see the *Query and Export Guide*.

Gifts for This Month

Row	Name	Gift Date	Gift Type	Fund	Gift Amount
1	Adamson, Mark Daniel	04/25/2007	Cash	International Relief Fund	$5,000.00
2	Andrews, Allison Eve	04/08/2007	Cash	Building Fund	$500.00
3	Autumn Industries, Inc.	04/04/2007	Cash	Natural Disaster Relief Fund	$1,000.00
4	Autumn Industries, Inc.	04/01/2007	Cash	Library Fund	$500.00
5	Davenport Creamery	04/01/2007	Cash	Library Books	$10,000.00
6	Jefferson, Richard Joseph	04/29/2007	Cash	International Relief Fund	$5,000.00
7	Rahman, Mohammed	04/02/2007	Cash	Library Fund	$40.00
8	Rhodes, Kyle Matthew	04/02/2007	Cash	Building Fund	$100.00

To add or change columns and sorting for the dashboard, edit the query. For information about creating a query panel, see “Create a new Dashboard panel” on page 12.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your query panel. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Default Sort	Notes
Description			Enter a name for the query panel.
Query name	Defaults the fields on the query Output tab.	Defaults the sort order specified on the query Sort tab.	To select a query, click the binoculars. The Open Query screen appears to select a query. To create a new query for the dashboard, click **Add**. After you select a query, the query name defaults in the field.
Only show the top [ ] record(s)			In the box, enter the number of records to appear on the dashboard panel.

Campaign

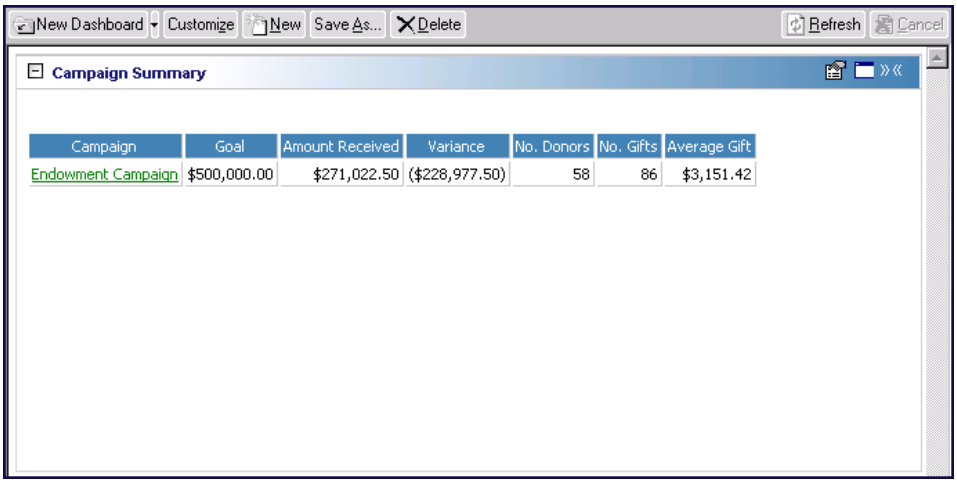
Use the following campaign Dashboard panels to analyze and monitor your campaign's progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Campaign Summary

To easily view information about your organization's campaigns, create a Campaign Summary. By creating a Campaign Summary, you can view detailed information about goal amounts, received amounts, average gift amounts, number of donors, number of gifts, and variance amounts for one campaign, or for all campaigns.

Note: You can graph the Campaign Summary. For more information about graphing Dashboard summaries, see "Graph and customize a panel" on page 30.

You can use the Campaign Summary to help plan for a current campaign. For example, you want to process a summary for the Endowment Campaign to help plan for your new campaign. You want to see the number of donors and the number of gifts in your summary results, along with the other default output. You can select the information you need on the Edit Campaign Summary Panel. For information about creating a summary, see "Create a new Dashboard panel" on page 12.



Campaign	Goal	Amount Received	Variance	No. Donors	No. Gifts	Average Gift
Endowment Campaign	$500,000.00	$271,022.50	($228,977.50)	58	86	$3,151.42

Tip: You can open a campaign record by clicking the campaign name in the panel results on the Dashboard page.

After you analyze the results of the Endowment Campaign summary, you can determine what works well for your organization and the areas that need improvement for your new campaign.

Any selections you make on the Edit Campaign Summary Panel save when you click **OK**. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about editing a summary, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output				Options include: Table, Graph, or Table and Graph
Campaigns to include	Campaign		Campaign	To process results, select at least one campaign
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
	Goal	Goal		Defaults from the **Overall goal** field in the campaign record

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount Received	Amount Received		If the gift is a split gift, the split amounts are included for the **Amount Received** column. Includes Cash, Stock/Property (sold amount - broker fee if sold), Gift-in-Kind, Other, Pledge payments, MG Pledge payments, Recurring Gift payments (if marked for Gift types to include).
	Variance	Variance		Goal minus Amount Received = Variance
		No. Donors		Each constituent is counted as a donor only once. For example, if Julie Bach donates two gifts to a campaign, she is included only once in this column.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		No. Gifts		If the gift is a split gift, it is counted only one time for this column.
		Average Gift		Total Committed / No. Gifts = Average Gift
	Total Committed	Total Committed		Amount Received + Pledge balance, MG Pledge balance, and Recurring Gift amount (if marked for Gift types to include). Pledge and MG Pledge balance calculates any adjustments or write-offs for the Pledge. Recurring Gift amount is the last amount the gift was amended to.

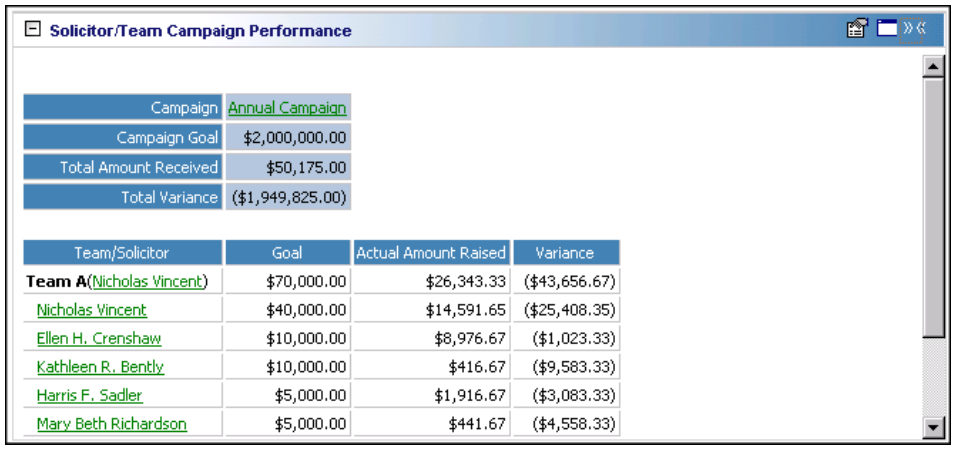
Solicitor/Team Campaign Performance

Note: You can select only one campaign for the Solicitor/Team Campaign Performance summary.

The Solicitor/Team Campaign Performance summarizes individual solicitor and team performance information based on campaigns. You can view details such as goal amounts, received amounts, and variance amounts to determine who is meeting target and who still has goals to meet.

Warning: In this example, only the gift types of Cash and Pledge Payment Cash display in the results panel. For more information on calculating Pledge Payments in Dashboard, see "Pledge Payments and Matching Gift Pledge Payments" on page 53.

For example, you are in the middle of your Annual Campaign and want to check the progress of your teams' performance. At this time, you want to view only Cash and Pledge Payment Cash gifts. You want to see the team goal amounts, team actual amounts, and team variance amounts, including to whom they report in your Solicitor/Team Campaign Performance summary results. For more information about creating a summary, see "Create a new Dashboard panel" on page 12.



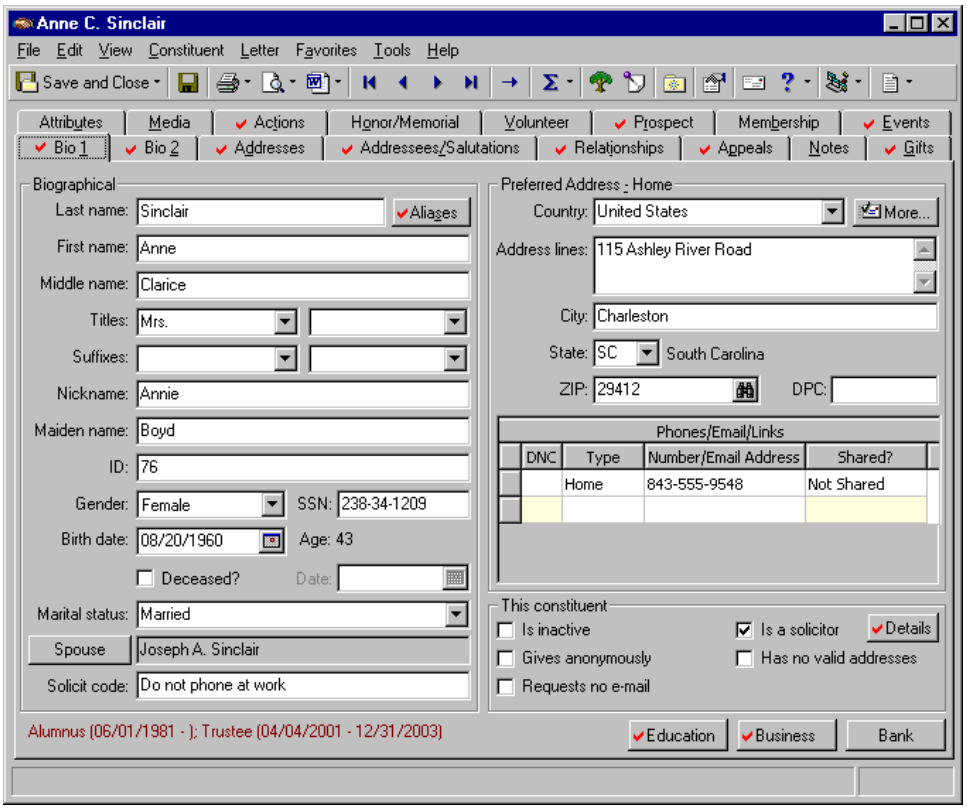
Solicitor/Team Campaign Performance

Campaign	Annual Campaign
Campaign Goal	$2,000,000.00
Total Amount Received	$50,175.00
Total Variance	($1,949,825.00)

Team/Solicitor	Goal	Actual Amount Raised	Variance
Team A(Nicholas Vincent)	$70,000.00	$26,343.33	($43,656.67)
Nicholas Vincent	$40,000.00	$14,591.65	($25,408.35)
Ellen H. Crenshaw	$10,000.00	$8,976.67	($1,023.33)
Kathleen R. Bently	$10,000.00	$416.67	($9,583.33)
Harris F. Sadler	$5,000.00	$1,916.67	($3,083.33)
Mary Beth Richardson	$5,000.00	$441.67	($4,558.33)

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see "Dashboard Action Bars" on page 49.

To open a solicitor's constituent record, click the solicitor name in the **Solicitor** column of the panel. You can also open a campaign record by clicking the campaign name in the table. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the summary results on the Dashboard page, see "View or modify a record from panel results" on page 26.



The gift information you view on the Solicitor/Team Campaign Performance summary on the Dashboard page is the gift information your organization receives as a result of your solicitors' efforts.

Any selections you make on the Edit Solicitor/Team Campaign Performance Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about editing a summary, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Solicitor/Team Campaign Performance Filters

All filters are important in defining the information you need to process the Solicitor/Team Campaign Performance results you want. Of the four filters in this summary, two require careful consideration. They can heavily impact your results.

If you mark the **Only include solicitors not meeting target** checkbox, only solicitors or teams not meeting target included in the summary. If you unmark this checkbox, solicitors and teams meeting target are also included in the summary. A team that meets its goal is always included in the panel results, even if an individual solicitor on the team does not meet his goal. This is true even if you mark this checkbox. If a solicitor has met target, but his team has *not* met target, he is still excluded from the Solicitor/Team Campaign Performance if you mark this checkbox.

If you do not mark the **List individual solicitors** checkbox, only teams list with the team captain's name in parentheses. If you leave this checkbox unmarked and mark the **Only include solicitors not meeting target** checkbox, any team not meeting target displays in the results panel. If a team has met target, but its subteam has not met target, it lists on the results with the original team and the subteam beneath it. For more information about teams, see the Solicitors chapter of the *Constituent Data Entry Guide*.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Only include solicitors not meeting target				For more information, see "Solicitor/Team Campaign Performance Filters" on page 62.
List individual solicitors				For more information, see "Solicitor/Team Campaign Performance Filters" on page 62.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr, Include all dates
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Campaign	Campaign			You can select only one campaign.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Campaign Goal	Campaign Goal		Defaults from the **Overall goal** field on the campaign record.
	Amount Received	Amount Received		For the selected campaign, sums the field **Amount** on the gift record for gifts with the same campaign in the **Campaign** field on the gift record.
	Total Variance	Total Variance		Difference between Amount Received and Campaign Goal.
	Team		The panels display in the order records (teams and solicitors) appear on the campaign record.	Defaults from **Team name** field within the **Solicitors** button on the campaign record.
	Team Goal	Team Goal		Defaults from the **Goal amount** field on the Goals tab within the **Details** button of the campaign record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount Raised by Team	Amount Raised by Team		Sum of the amounts for all solicitors on a team. If a solicitor is on two teams, his gifts are counted twice.
	Team Variance	Team Variance		Difference between Amount Raised by Team and Team Goal.
	Solicitor		The panels display in the order records (teams and solicitors) appear on the campaign record.	Defaults solicitor's name from the name fields on the Bio 1 tab of the constituent record.
	Solicitor Goal	Solicitor Goal		Defaults from the **Goal amount** field on the constituent or campaign record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount Raised by Solicitor	Amount Raised by Solicitor		For the selected campaign, sums the field **Amount** on the gift record for gifts with the same solicitor name in the **Solicitors** field on the gift record.
	Solicitor Variance	Solicitor Variance		Difference between Amount Raised by Solicitor and Solicitor Goal.

Fund

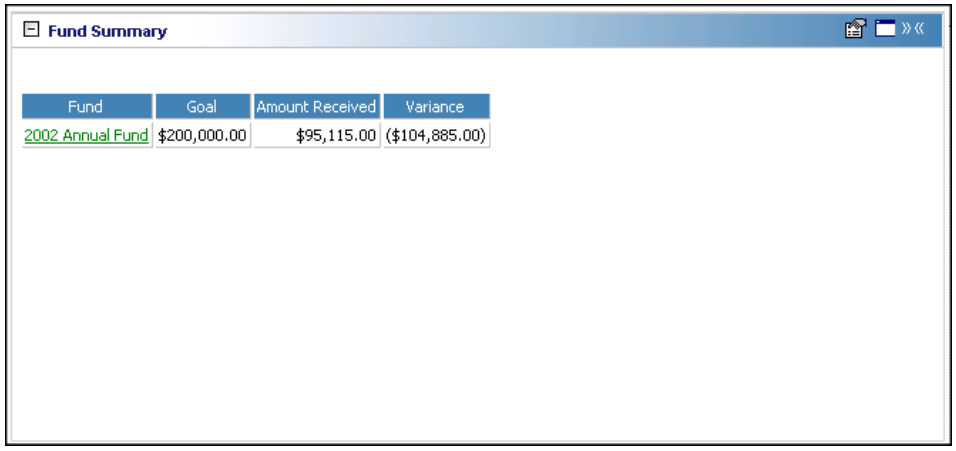
Use the following fund Dashboard panels to analyze and monitor your fund's progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Fund Summary

To easily view information about your organization's funds, create a Fund Summary. By creating a Fund Summary, you can view detail information about goal amounts, received amounts, average gift amounts, number of donors, number of gifts, and variance amounts for one or more funds.

Note: You can graph the Fund Summary. For more information about graphing Dashboard summaries, see "Graph and customize a panel" on page 30.

You can use the Fund Summary to compare fund goals with the actual gift amounts your organization receives. For example, the goal for your 2002 Annual Fund is $200,000. You can process the Fund Summary to compare the goal amount with the actual amount your organization receives. If you select to include the variance in the output of the summary, the difference between these two amounts automatically calculates by subtracting the amount received from the goal amount. For information about creating a panel, see "Create a new Dashboard panel" on page 12.



Tip: You can open a fund record by clicking the fund name in the panel results on the Dashboard page.

Any selections you make on the Edit Fund Summary Panel save when you click **OK**. These selections do not change unless you edit or delete the Fund Summary from the Customize Dashboard panel. For information about editing a summary, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output				Options include: Table, Graph, or Table and Graph
Funds to include	Fund		Fund	To process results, select at least one fund.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
	Goal	Goal		Defaults from **Overall goal** field on fund record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount Received	Amount Received		If the gift is a split gift, the split amounts are included for the **Amount Received** column. Includes Cash, Stock/Property (sold amount - broker fee if sold), Gift-in-Kind, Other, Pledge payments, MG Pledge payments, Recurring Gift payments (if marked for Gift types to include).
	Variance	Variance		Goal minus Amount Received = Variance
		No. Donors		Each constituent is counted as a donor only once. For example, if Julie Bach donates two gifts to a campaign, she is included only once in this column.

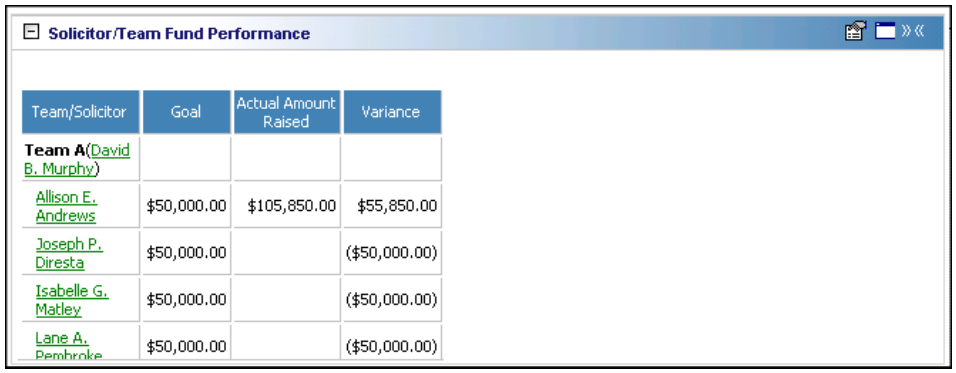
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		No. Gifts		If the gift is a split gift, it is only counted one time for this column.
		Average Gift		Total Committed / No. Gifts = Average Gift
	Total Committed	Total Committed		Amount Received + Pledge balance, MG Pledge balance, and Recurring Gift amount (if marked for Gift types to include). Pledge and MG Pledge balance calculates any adjustments or write-offs for the Pledge. Recurring Gift amount is the last amount the gift was amended to.

Solicitor/Team Fund Performance

Creating the Solicitor/Team Fund Performance summary lets you quickly view individual solicitor and team performance information based on funds. You can view details, such as goal amounts, actual amounts, and variance amounts to determine who is meeting target, and who still has goals to meet.

Note: You can select only one fund for the Solicitor/Team Fund Performance summary.

For example, you want to view information on your current Building Fund to see if solicitors' efforts have been successful. You want to see the solicitor goal amounts, solicitor actual amounts, and solicitor variance amounts, including to whom each solicitor reports in your Solicitor/Team Fund Performance summary results. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.



Solicitor/Team Fund Performance

Team/Solicitor	Goal	Actual Amount Raised	Variance
Team A(David B. Murphy)			
Allison E. Andrews	$50,000.00	$105,850.00	$55,850.00
Joseph P. Diresta	$50,000.00		($50,000.00)
Isabelle G. Matley	$50,000.00		($50,000.00)
Lane A. Pembroke	$50,000.00		($50,000.00)

To open a solicitor's constituent record, click the solicitor name in the **Solicitor** column of the summary panel. The gift information you view on the Solicitor/Team Fund Performance summary on the Dashboard page is the gift information your organization receives as a result of your solicitor's efforts.

Any selections you make on the Edit Solicitor/Team Fund Performance Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about editing a summary, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Solicitor/Team Fund Performance Filters

All filters are important in defining the information you need for the Solicitor/Team Fund Performance panel results. Of the four filters in this summary, two require careful consideration. They can heavily impact your results.

If you mark the **Only include solicitors not meeting target** checkbox, only solicitors or teams not meeting target are included in the summary. If you unmark this checkbox, solicitors and teams meeting target are also included in the summary. A team that meets its goal is always included in the panel results, even if an individual solicitor on the team does not meet his goal. This is true even if you mark this checkbox. If a solicitor has met target, but his team has *not* met target, he is excluded from the Solicitor/Team Fund Performance summary if you mark this checkbox.

If you do not mark the **List individual solicitors** checkbox, only teams list on the summary, with the team captain's name in parentheses. If you leave this checkbox unmarked and mark the **Only include solicitors not meeting target** checkbox, any team not meeting target displays on the results panel. If a team has met target, but its subteam has not met target, it lists on the summary results with the original team and the subteam beneath it. For more information about teams and subteams, see the Solicitors chapter of the *Constituent Data Entry Guide*.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Only include solicitors not meeting target				For more information, see "Solicitor/Team Fund Performance Filters" on page 71.
List individual solicitors				For more information, see "Solicitor/Team Fund Performance Filters" on page 71.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Fund	Fund			You can select only one fund.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Fund Goal	Fund Goal		Defaults from the **Overall goal** field on the fund record.
	Amount Received	Amount Received		For the selected fund, sums the field **Amount** on the gift record for gifts with the same fund in the **Fund** field on the gift record.
	Total Variance	Total Variance		Difference between Amount Received and Fund Goal.
	Team		The panels display in the order records (teams and solicitors) appear on the fund record.	Defaults from **Team name** field within the **Solicitors** button on the fund record.
	Team Goal	Team Goal		Defaults from the **Goal amount** field on the Goals tab within the **Details** button of the fund record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount Raised by Team	Amount Raised by Team		Sum of the amounts for all solicitors on a team. If a solicitor is on two teams, his gifts are counted twice.
	Team Variance	Team Variance		Difference between Amount Raised by Team and Team Goal.
	Solicitor		The panels displays in the order records (teams and solicitors) appear on the fund record.	Defaults solicitor's name from the name fields on the Bio 1 tab of the constituent record.
	Solicitor Goal	Solicitor Goal		Defaults from the **Goal amount** field on the constituent or fund record.
	Amount Raised by Solicitor	Amount Raised by Solicitor		For the selected fund, sums the field **Amount** on the gift record for gifts with the same solicitor name in the **Solicitors** field on the gift record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Solicitor Variance	Solicitor Variance		Difference between Amount Raised by Solicitor and Solicitor Goal.

Appeal

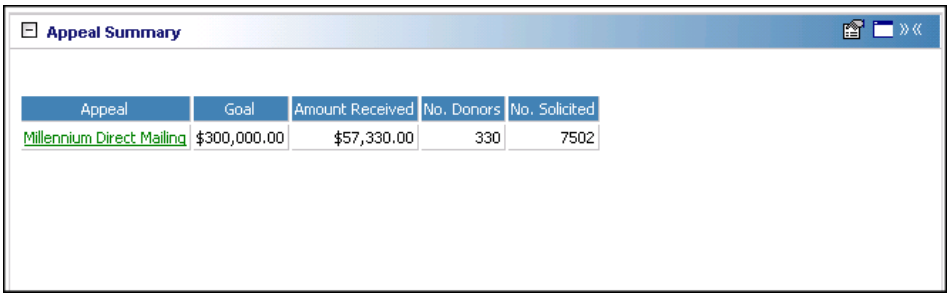
Use the following appeal Dashboard panels to analyze and monitor your appeal's progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Appeal Summary

To easily view information about your organization's appeals, create an Appeal Summary. By creating an Appeal Summary, you can view detail information about goal amounts, received amounts, average gift amounts, number of donors, number of gifts, expenses, cost per dollar raised, number solicited, percentage of donations, and variance amounts for one or more appeals.

Note: You can graph the Appeal Summary. For more information about graphing Dashboard summaries, see "Graph and customize a panel" on page 30.

You can use the Appeal Summary to quickly view an appeal's progress and compare the information with the number of constituents solicited. For example, you recently sent out your Millennium Direct Mailing appeal, and you want to see if it is successful so far. After you select the appeal on the Edit Appeal Summary Panel, you can include the **Goal**, **Amount Received**, **No. Donors**, and **No. Solicited** information to monitor the appeal's success. For information about creating a panel, see "Create a new Dashboard panel" on page 12.



Tip: You can open an appeal record by clicking the appeal name in the table summary panel on the Dashboard page.

Any selections you make on the Edit Appeal Summary Panel save when you click **OK**. These selections do not change unless you edit or delete the Appeal Summary from the Customize Dashboard panel. For information about editing a summary, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output				Options include: Table, Graph, or Table and Graph
Appeals to include	Appeal		Appeal	To process results, select at least one appeal.
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
	Goal	Goal		Defaults from **Overall goal** field on the appeal record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount Received	Amount Received		If the gift is a split gift, the split amounts are included for the **Amount Received** column. Includes Cash, Stock/Property (sold amount - broker fee if sold), Gift-in-Kind, Other, Pledge payments, MG Pledge payments, Recurring Gift payments (if marked for Gift types to include).
	Variance	Variance		If you select the **Expenses** field in **Columns to Show**, expense amounts are included in the variance.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		No. Donors		Each constituent is counted as a donor only once. For example, if Julie Bach donates two gifts to a campaign, she is included only once in this column.
		No. Gifts		If the gift is a split gift, it is only counted one time for the **No. Gifts** column.
		Average Gift		Total Committed / No. Gifts = Average Gift

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Total Committed	Total Committed		Amount Received + Pledge balance, MG Pledge balance, and Recurring Gift amount (if marked for Gift types to include). Pledge and MG Pledge balance calculates any adjustments or write-offs for the Pledge. Recurring Gift amount is the last amount the gift was amended to.
		Expenses		Sum of **Amount** column on the Attributes/ Expenses tab of the appeal record.
		Cost / Dollar Raised		(Total expense amount/ Total amount) = cost per dollar raised.
		No. Solicited		Defaults from **No. solicited** field on the appeal record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		% Donated		(number donors / number solicited) x 100 = percent donated

Appeal Package Response

Note: You can graph the Appeal Package Response. For more information about graphing Dashboard summaries, see “Graph and customize a panel” on page 30.

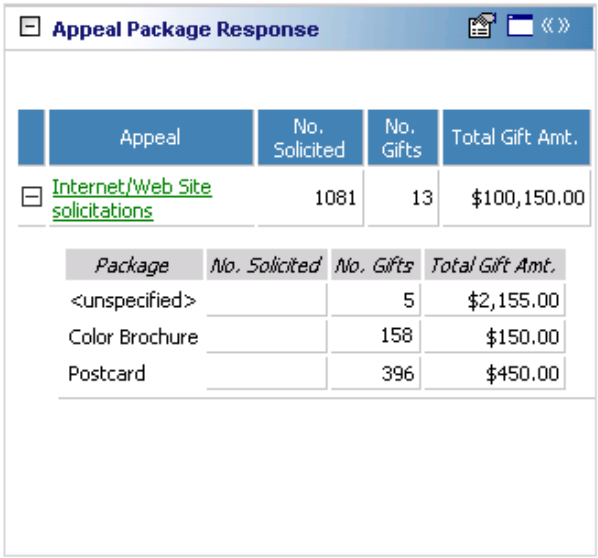
By creating an Appeal Package Response, you can easily compare the success of your appeal’s packages. You can create the panel to filter constituency code, appeal, and gift type information. You can also calculate the total number of constituents, total number of gifts, and the total amount of donations given in response to the appeal’s package.

Creating an Appeal Package Response to compare the success of your various appeals is quick and easy. For example, you sent new Internet appeal packages to encourage constituents to visit your organization’s Web site. One of these appeal packages is a postcard reminding constituents of the Web site and the other is a color brochure with the same information. Anticipating appeals will generate online donations, you want to view the response to both packages to evaluate which one is more successful. For more information about creating a Dashboard panel, see “Create a new Dashboard panel” on page 12.

Once you process the Appeal Package Response, the panel continues to display on the Dashboard page, unless you hide or delete it. To update the panel to monitor the appeal package’s daily progress, click **Refresh** on the Dashboard action bar. For more information about hiding a panel, see “Hide a panel” on page 28. For more information about deleting a panel, see “Delete a panel” on page 39.

Tip: You can open an appeal record by clicking the appeal name in the panel results on the Dashboard page.

To view package and other information on the Appeal Package Response panel, click the square to the left of Internet\Web Site solicitations.



Note: If "<unspecified>" information appears in your results panel, the **Package** field is blank on certain gift records.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output				Options include: Table, Graph, or Table and Graph
Appeals to include	Appeal		Appeal	To process results, select at least one appeal.
Constituencies to include				Comes from the Bio 2 tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
	Package	Package	Package	Defaults from the package **Description** field on the appeal record.
	No. Donors	No. Donors		Each constituent is counted as a donor only once. For example, if Julie Bach donates two gifts to a campaign, she is included only once in this column.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	No. Solicited	No. Solicited		Defaults from **No. solicited** field on the appeal record.
	No. Gifts	No. Gifts		Calculates the number of gifts given in response to appeals and packages.
	Total Gift Amt.	Total Gift Amt.		Calculates the total gift amount given in response to appeals and packages.

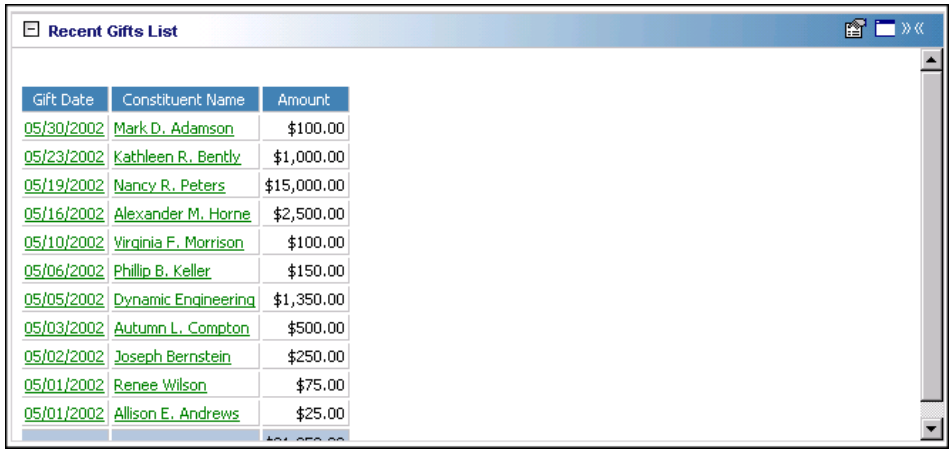
Gift

Use the following gift Dashboard panels to analyze and monitor your gifts' progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Recent Gifts List

The Recent Gifts List monitors gifts given to your organization in the current week, last week, month, quarter, calendar year, or fiscal year. You can further filter these gifts by selecting a minimum gift amount to view, constituent codes, gift types, campaigns, funds, or appeals.

If you are in the middle of a large campaign or fund drive, the Recent Gifts List gives you all the information you need to monitor the progress of the drive as frequently as you like. For example, you are in the middle of the 2002 Annual Fund, and you want to know the gift amount donated so far in the current month. By filtering the 2002 Annual Fund and selecting “This month” from the **Date range** list, you can view all information you need to continuously monitor the incoming gifts for the current month. For information about creating a panel, see “Create a new Dashboard panel” on page 12.

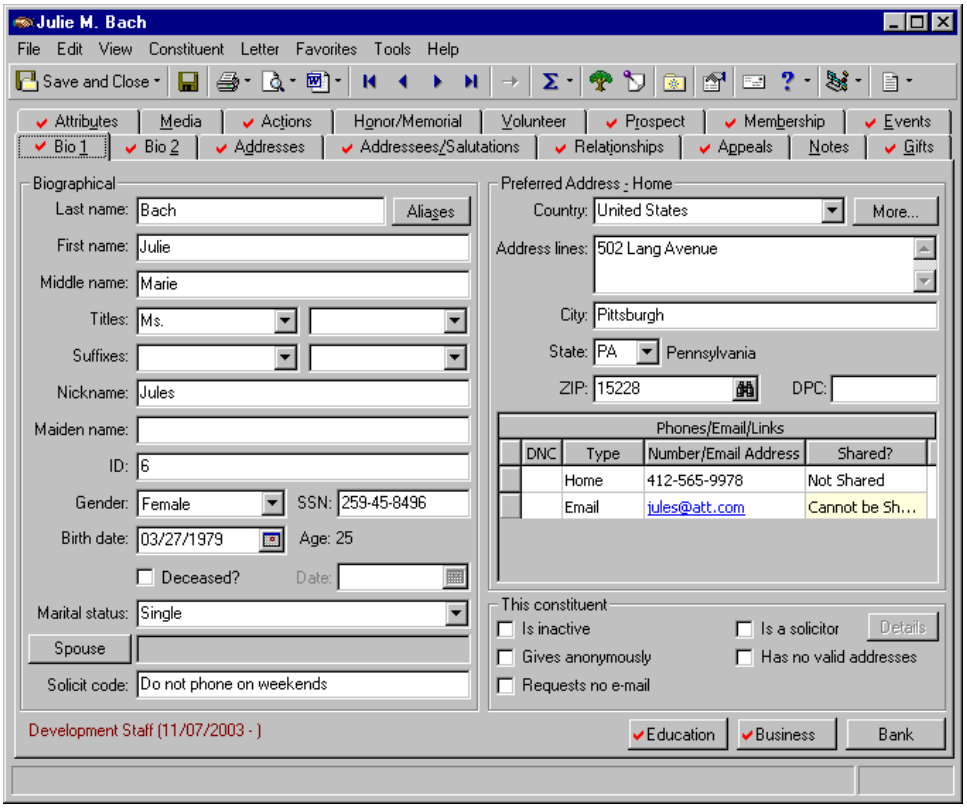


Recent Gifts List

Gift Date	Constituent Name	Amount
05/30/2002	Mark D. Adamson	$100.00
05/23/2002	Kathleen R. Bently	$1,000.00
05/19/2002	Nancy R. Peters	$15,000.00
05/16/2002	Alexander M. Horne	$2,500.00
05/10/2002	Virginia F. Morrison	$100.00
05/06/2002	Phillip B. Keller	$150.00
05/05/2002	Dynamic Engineering	$1,350.00
05/03/2002	Autumn L. Compton	$500.00
05/02/2002	Joseph Bernstein	$250.00
05/01/2002	Renee Wilson	$75.00
05/01/2002	Allison E. Andrews	$25.00

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see “Dashboard Action Bars” on page 49.

In addition to the information on the Recent Gifts List panel, you can open the constituent or gift record from the Dashboard page. Once the Recent Gifts List finishes processing, you can click a gift date to open the gift record and the constituent name to open the constituent record. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the summary results on the Dashboard page, see “View or modify a record from panel results” on page 26.



Any selections you make on the Edit Recent Gifts Panel save when you click **OK**. These selections do not change unless you edit or delete the Recent Gifts List from the Customize Dashboard panel. For information about editing a summary, see “Open and edit a panel” on page 20. For information about deleting a summary, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Do not show gifts less than				For example, if you want only to include gifts in the amount of $100 or higher, enter $100.
Show soft credit recipients				Soft credits in the list appear in italics.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include		Constituent Code		Comes from the Bio 2 tab of the constituent record.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Gift types to include		Gift Type		Pledges: the amount in the summary is the Master Pledge amount.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Campaigns to include		Campaign		Select at least one campaign, fund, or appeal to increase the processing speed.
Funds to include		Fund		Select at least one campaign, fund, or appeal to increase the processing speed.
Appeals to include		Appeal		Select at least one campaign, fund, or appeal to increase the processing speed.
	Gift Date	Gift Date	Gift Date	Defaults from the **Gift date** field on the gift record.
	Constituent Name			Matching Gifts display with the organization name first, followed by the individual's name responsible for the gift in parentheses.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount	Amount		Defaults from the **Amount** field on the gift record.

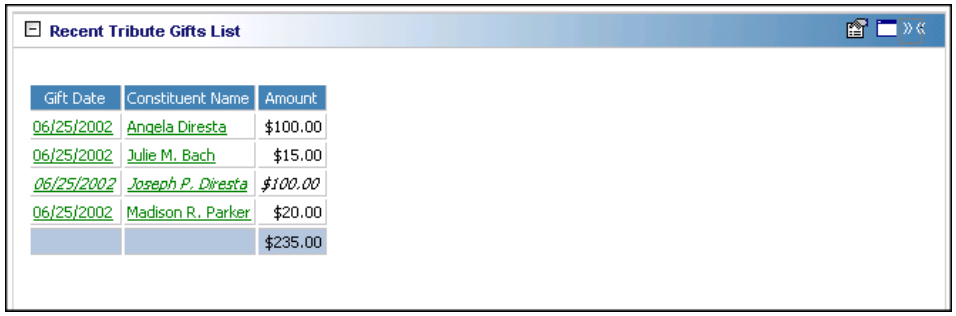
Recent Tribute Gifts List

Note: For more information about *Honor/Memorial Tracking*, see the *Tribute Data Entry Guide*.

If you use the optional module *Honor/Memorial Tracking*, you can process the Recent Tribute Gifts List. You can select to view all recent gifts made in honor, memory, or celebration of an individual or organization in the current or last week, month, quarter, calendar year, or fiscal year. You can filter these gifts further by selecting a minimum gift amount to view constituent codes, gift types, or tributes.

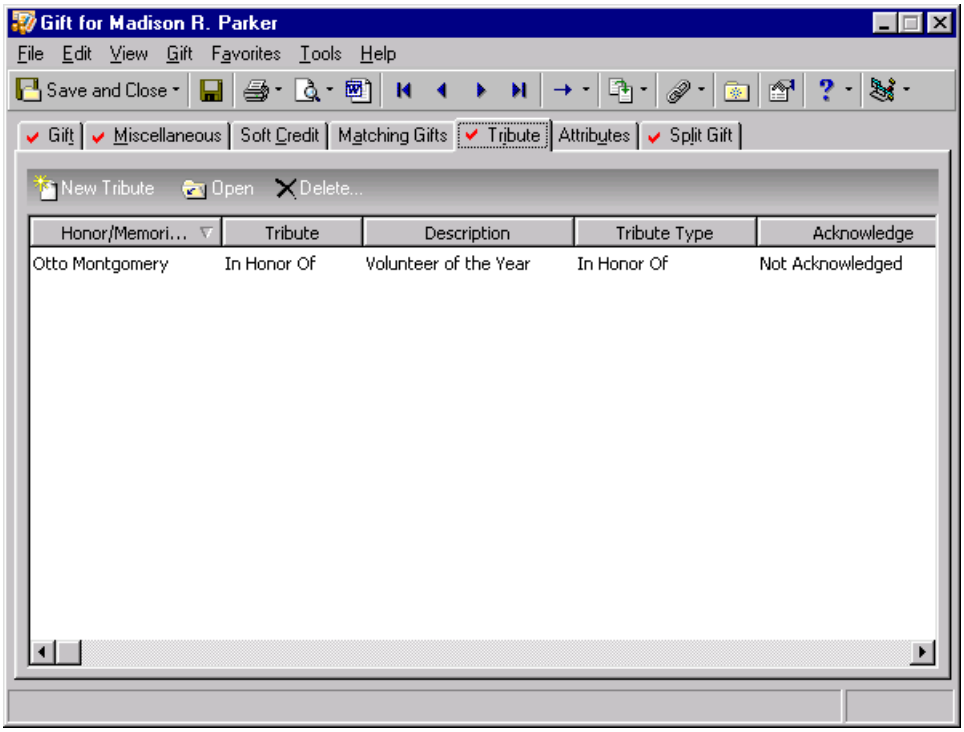
Warning: It is important to remember if you mark **Show Soft Credit recipients?**, totals in your panels results will inflate because individual amounts for the donor and the soft credit recipient are included.

You can use the Recent Tribute Gifts List to quickly view a list of gifts given for an upcoming event to honor someone. For example, you are hosting a luncheon in honor of Otto Montgomery, your Volunteer of the Year. You made a note on the invitation stating the luncheon is free, but a donation in honor of the volunteer is welcome. Anticipating that the note will generate gifts for your organization, you want to run the Recent Tribute Gifts List to view the information. For more information about creating a panel, see “Create a new Dashboard panel” on page 12.



Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see “Dashboard Action Bars” on page 49.

In addition to the information on the Recent Tribute Gifts List panel, you can open a donor's constituent record or gift record and view the tribute information. Once the Recent Tribute Gifts List finishes processing, click a donor's name to open the constituent record. Click the gift date to open the gift record to view the Tribute tab. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the summary results on the Dashboard page, see "View or modify a record from panel results" on page 26.



Any selections you make on the Edit Recent Tribute Gifts Panel save when you click **OK**. These selections do not change unless you edit or delete the Recent Tribute Gifts List from the Customize Dashboard panel. For information about editing a summary, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Do not show gifts less than				For example, if you only want to include gifts in the amount of $100 or higher, enter $100.
Show soft credit recipients				Soft credits in the summary appear in italics.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include		Constituent Code		Comes from the Bio 2 tab of the constituent record.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Gift types to include		Gift Type		Pledges: the amount in the summary is the Master Pledge amount.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Selected tributes		Honor/ Memorial Name		Defaults tribute's name from the name fields on the Bio 1 tab of the constituent record.
Campaigns to include		Campaign		Select at least one campaign, fund, or appeal to increase processing speed.
Funds to include		Fund		Select at least one campaign, fund, or appeal to increase processing speed.
Appeals to include		Appeal		Select at least one campaign, fund, or appeal to increase processing speed.
	Gift Date	Gift Date	Gift Date	Defaults from the **Gift date** field on the gift record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Constituent Name			Matching Gifts display with the organization name first, followed by the individual's name responsible for the gift in parentheses.
	Amount	Amount		Defaults from the **Amount** field on the gift record.

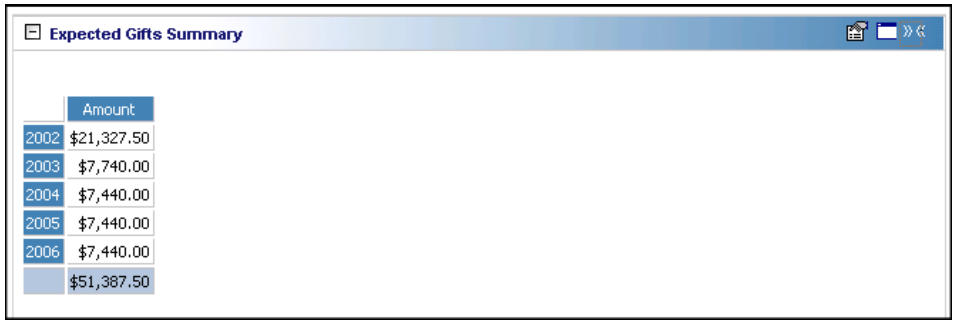
Expected Gifts Summary

Being able to predict your organization's cash flow in the future is a vital part of any nonprofit organization. The Expected Gifts Summary gives you the detail information you need to make good predictions. By default, the Expected Gifts Summary processes Pledge installments, Recurring Gifts, and Matching Gift Pledge installments that are due in the future. You can create the Expected Gifts Summary based on the next four weeks, three months, four quarters, five calendar years, or five fiscal years.

If you select "Week" in the **Total by** field, the summary results contain the gifts your organization should receive in the next four weeks. If you select "Month", the results include the next three months. Selecting "Quarter" includes the gifts you should receive in the next four quarters. If you select "Calendar Year" or "Fiscal Year", the Expected Gifts Summary results include gifts you should receive in the next five years.

Note: You can graph the Expected Gifts Summary. For more information about graphing Dashboard summaries, see "Graph and customize a panel" on page 30.

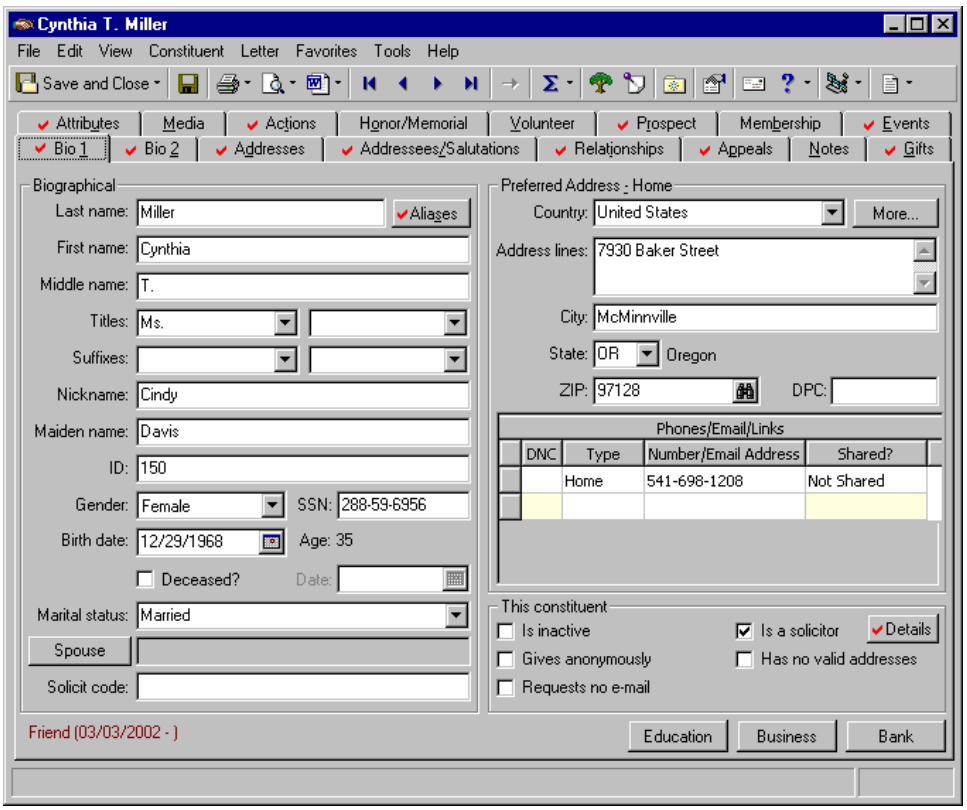
For example, during the last quarter of 2001, you held your major campaign drive for the Annual Campaign. You can run the Expected Gifts Summary to view and analyze what you can expect your organization to receive as a result of this campaign drive. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.



For this example, summary results on the Dashboard page also include expected gift information for the next five years, by default.

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see "Dashboard Action Bars" on page 49.

In addition to the information on the Expected Gifts Summary panel, you can open the constituent record if you select "Constituent" in the **Breakdown by** field. Once the Expected Gifts Summary finishes processing, click a constituent name to open the constituent record. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the summary results on the Dashboard page, see "View or modify a record from panel results" on page 26.



Any selections you make on the Edit Expected Gifts Summary Panel save automatically. These selections do not change unless you edit or delete the panel from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a summary, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Total by	Columns default based on selection you make in **Total by** field			Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year
Breakdown by				Options include: Solicitor, Constituent Code, Campaign, Fund, Appeal, or Constituent
Output				Options include: Table, Graph, or Table and Graph
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituencies to include	Constituent Code (if selected in **Breakdown by** field)		Constituent Code (if selected in **Breakdown by** field)	You can still filter this information, even if it is not selected in the **Breakdown by** field.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Campaigns to include	Campaign (if selected in **Breakdown by** field)		Campaign (if selected in **Breakdown by** field)	You can still filter this information, even if it is not selected in the **Breakdown by** field.
Funds to include	Fund (if selected in **Breakdown by** field)		Fund (if selected in **Breakdown by** field)	You can still filter this information, even if it is not selected in the **Breakdown by** field.
Appeals to include	Appeal (if selected in **Breakdown by** field)		Appeal (if selected in **Breakdown by** field)	You can still filter this information, even if it is not selected in the **Breakdown by** field.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Solicitor (if selected in **Breakdown by** field)		Solicitor (if selected in **Breakdown by** field)	Defaults from **Solicitors** field on the gift record.
	Constituent (if selected in **Breakdown by** field)		Constituent (if selected in **Breakdown by** field)	Defaults from the **Constituent** field on the gift record.
	Amount			Includes: Pledge installments, Recurring Gifts, and MG Pledge installments. Only gifts with a status of Active are considered for the summary.

Overdue Gifts List

Collecting overdue gifts is one of the most important tasks performed by your organization. The Overdue Gifts List analyzes these gifts by constituent codes, campaigns, funds, and appeals by selecting them as filters. With these filters, you can view soft credit information, gift dates, constituent names, and past due amounts.

Note: Matching Gifts display in the Overdue Gifts List with the organization name first, followed by the individual name in parentheses. For more information on Matching Gifts in Dashboard, see “Matching Gifts” on page 54.

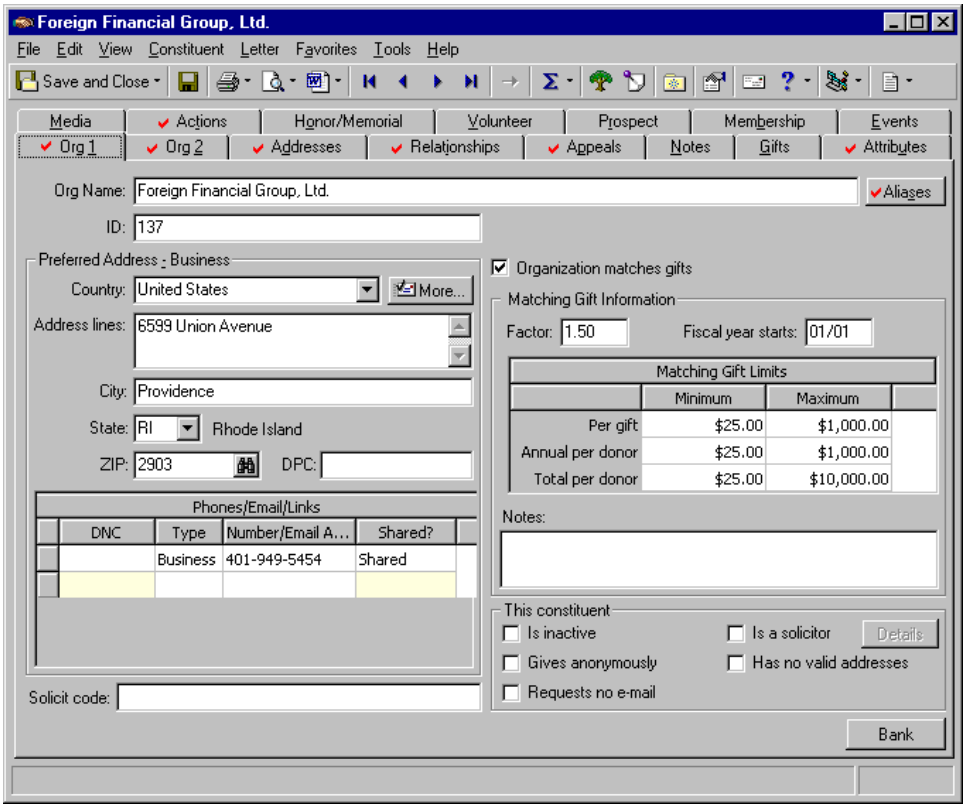
You can use the Overdue Gifts List to process information for a fund that ended last year. For example, your 2001 Annual Fund officially ended on December 31, 2001. For this fund, you want to view any gifts that still remain outstanding. To do this, select “2001 Annual Fund” in the **Funds to include** row. The default selections for this summary automatically include Gift Date, Constituent Name, Amount, and Past Due. This provides all the information you need to obtain the results you want for the Overdue Gifts List. For information about creating a panel, see “Create a new Dashboard panel” on page 12.

Overdue Gifts List

Constituent Name	Gift Date	Amount	Past Due
Oil One Distributor (Lajuan Wilson)	02/01/2001	$1,500.00	$1,500.00
Washington Photography Museum (Clara M. Daniels)	04/10/2001	$1,000.00	$1,000.00
RCS Corporation (Claudia L. Ivery)	07/06/2001	$90.00	$90.00
RCS Corporation (Audrey I. Lorenz)	07/06/2001	$2,000.00	$2,000.00
Lane A. Pembroke	07/06/2001	$12,000.00	$5,000.00
Robert C. Hernandez	12/04/2001	$500.00	$2,500.00
		$17,090.00	$12,090.00

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see “Dashboard Action Bars” on page 49.

In addition to the information on the Overdue Gifts List panel, you can open constituent and gift records. Once the Overdue Gifts List finishes processing, click a gift date to open the gift record or click a constituent name to open the constituent record. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the panel results on the Dashboard page, see “View or modify a record from panel results” on page 26.



Any selections you make on the Edit Overdue Gifts Panel save automatically. These selections do not change unless you edit or delete the Overdue Gifts List from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a summary, see “Delete a panel” on page 39.

Gift Types in the Overdue Gifts List

Gift types in the Overdue Gifts List include: Pledge, Matching Gift Pledge, and Recurring Gift.

Pledges and Matching Gift Pledges and their installments overdue as of today’s date list on the Overdue Gifts List. Overdue amounts are not broken down by installments. They are summarized to show the full amount that is overdue. The **Amount** column reflects the Master pledge amount for both Pledges and Matching Gift Pledges. The **Past Due** column is the sum of any unpaid installments due before today’s date, plus the balance of any partially paid installments. If any part of the Pledge or Matching Gift Pledge has been written off, the write-off amount does not reflect in the Overdue Gifts List because it is not considered an unpaid amount. Because of this same reason, Pledges and Matching Gift Pledges that have been completely written off are never included in the Overdue Gifts List.

Only Recurring Gifts with Active in the **Status** field of ***The Raiser’s Edge 7*** gift record are considered for the Overdue Gifts List. Unpaid Recurring Gift transactions due as of today’s date are overdue. The **Amount** column on the Overdue Gifts List reflects the amount of the Recurring Gift found in the **Amount** field in the gift record. The **Past Due** column calculates the sum of any unpaid transactions for Recurring Gifts. However, it does not calculate and reflect the balance of a partially paid Recurring Gift transactions.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Show soft credit recipient				Soft credits in the summary appear in italics.
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include		Constituent Code		Comes from the Bio 2 tab on the constituent record.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Campaigns to include		Campaign		Select at least one campaign, fund, or appeal to increase processing speed.
Funds to include		Fund		Select at least one campaign, fund, or appeal to increase processing speed.
Appeals to include		Appeal		Select at least one campaign, fund, or appeal to increase processing speed.
	Constituent Name			Matching Gifts display with the organization name first, followed by the individual's name responsible for the gift in parentheses.
	Gift Date			Defaults from the **Gift date** field on the gift record.

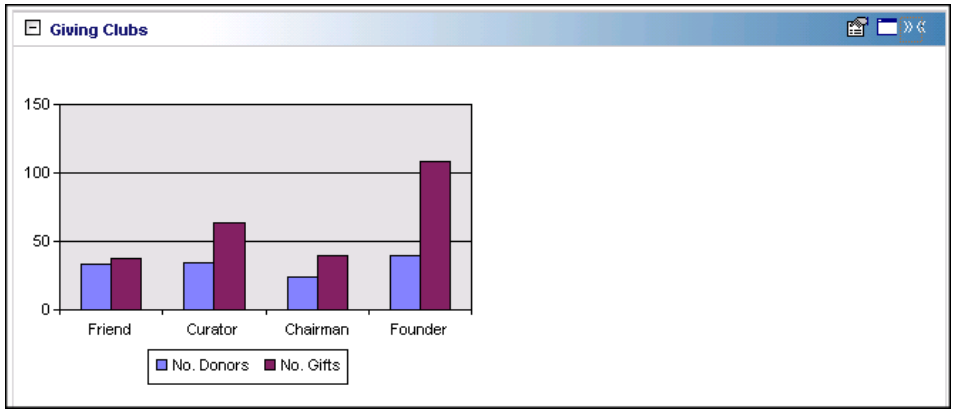
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount	Amount		For more information, see “Gift Types in the Overdue Gifts List” on page 100.
	Past Due			For more information, see “Gift Types in the Overdue Gifts List” on page 100.
		Last Payment Date		Defaults most recent payment date from the gift record.
		Last Reminder Sent		Shows date of the last reminder sent

Giving Clubs

The Giving Clubs summary divides constituents into donor categories (such as Benefactor, Patron, or Friend) based on the date range and gift types you select. With these donor categories, you can select to view the level of giving, number of donors, number of gifts, and the percentage of total.

Note: Gifts that do not fall within a category table you established in **Tables** in *Configuration*, display as “<unknown>” in the Giving Clubs panel results. For example, if the lowest category in the table you select in the **Donor Categories Table** field is between $100-$200, and three gifts are in the amount of $50, all three gifts appear in the <unknown> column. For more information about establishing these types of tables, see the Configuration chapter of the *Configuration & Security Guide*.

A Giving Club summary is beneficial to your organization in many ways. For example, your monthly Board Meeting is this week and you want to provide your board members with a graph of the most important donors in a donor category table. You also want to include the number of gifts these donors have given this quarter. Use the Giving Club summary to graph the results you need. For more information about graphing Dashboard panels, see “Graph and customize a panel” on page 30. For more information about creating Dashboard panels, see “Create a new Dashboard panel” on page 12.



From the Dashboard page, you can print the Giving Clubs summary for your board members. For more information about printing Dashboard panels, see “Print a panel” on page 34.

Any selections you make on the Edit Giving Clubs Panel save automatically. These selections do not change unless you edit or delete Giving Clubs from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output				Options include: Table, Graph, or Table and Graph
Donor categories table				Established from the **Tables** link of *Configuration*.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Donor categories	Donor Category Level			The specific donor category name you create from the **Tables** link of Configuratio n. Examples include Friend, Chairman, and Founder.
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Campaigns to include				Select at least one campaign, fund, or appeal to increase processing speed.
Funds to include				Select at least one campaign, fund, or appeal to increase processing speed.
Appeals to include				Select at least one campaign, fund, or appeal to increase processing speed.

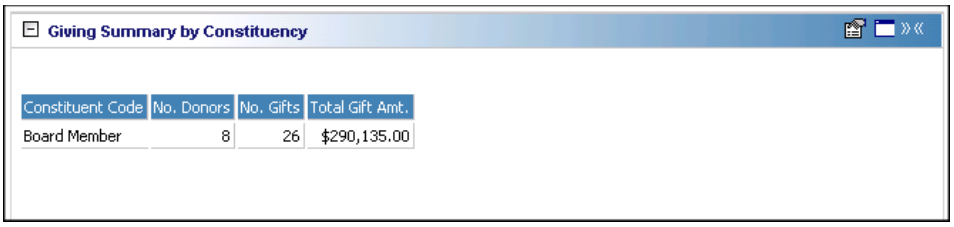
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	No. Donors	No. Donors		Calculates the total number of donors per category.
	No. Gifts	No. Gifts		Calculates the total number of gifts per category.
		Total Gift Amt.		Calculates the total gift amount per category.
	% Total	% Total		Percentage of the number of gifts per category
	% Gift Amount	% Gift Amount		Percentage of gift amount per category.

Giving Summary by Constituency

Note: You can graph the Giving Summary by Constituency. For more information about graphing Dashboard summaries, see “Graph and customize a panel” on page 30.

Every constituent should have at least one constituent code on the Bio 2 tab that defines the reason the constituent is in your database. Creating a Dashboard summary of gift information for these constituent codes is highly valuable to your organization to analyze gift giving. You can view the number of donors, number of gifts, and total amounts for constituent codes and break the summary down by campaign, funds, and appeals.

For example, your financial director needs a Dashboard summary for the number of gifts and the total amount given last quarter by your organization's board members. You can create and print a Giving Summary by Constituency with a constituent code of Board Member and a date range of last quarter. For information about creating a panel, see "Create a new Dashboard panel" on page 12.



Note: For more information about constituent code information in *Dashboard*, see "Constituent Codes" on page 54 in the Gift Information section.

If "<unknown>" information appears in your results panel, the **Constituent Code** field on the Bio 2 tab is blank on certain constituent records.

For more information about printing the Giving Summary by Constituency, see "Print a panel" on page 34.

Once you process the Giving Summary by Constituency, the summary continues to display on the Dashboard page, unless you hide or delete it. For more information about hiding a panel, see "Hide a panel" on page 28. For more information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Output				Options include: Table, Graph, or Table and Graph

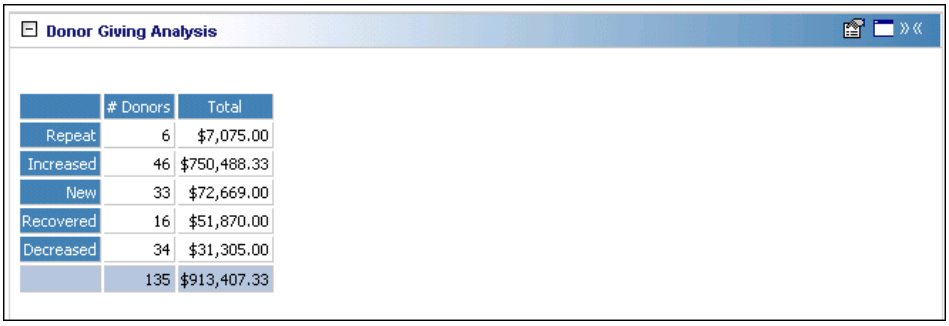
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include	Constituent Code			Comes from the Bio 2 tab on the constituent record.
Campaigns to include				Select at least one campaign, fund, or appeal to increase processing speed.
Funds to include				Select at least one campaign, fund, or appeal to increase processing speed.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Appeals to include				Select at least one campaign, fund, or appeal to increase processing speed.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
	No. Donors			Each constituent is counted as a donor only once. For example, if Julie Bach donates two gifts to a campaign, she is included only once in this column.
	No. Gifts	No. Gifts		If the gift is a split gift, it is only counted one time for this column.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Total Gift Amt.	Total Gift Amt.		Calculates the total gift amount per constituent code.

Donor Giving Analysis

The Donor Giving Analysis effectively processes and formats donor giving information so you can easily analyze donor giving. In this panel, information processes automatically for **Repeated**, **Increased**, **New**, **Recovered**, and **Decreased** donors. The **Repeated** row calculates the gift amounts donors have repeatedly given for the time period you select. The **Increased** and **Decreased** rows total gift amounts that have increased or decreased from your repeated donors. For example, Kimberly Luton donates $2,000 to your organization in 2001 and donates $2,500 in 2002. If you select "This calendar yr" in the **Date range** filter, $2,500 is added to the **Increased** row. The **Recovered** row calculates the amount given for the time period you select for constituents who did not give a gift in the previous time period, but made a donation to your organization two time periods ago. For example, you select to process the Donor Giving Analysis for the first quarter of 2003. In January 2003, Joseph Diresta gave a $100 gift for the first time since June 2002. So, his $100 gift is included in this row's total.



	# Donors	Total
Repeat	6	$7,075.00
Increased	46	$750,488.33
New	33	$72,669.00
Recovered	16	$51,870.00
Decreased	34	$31,305.00
	135	$913,407.33

You can filter the Donor Giving Analysis panel by date, gift amount, constituent codes, gift types, campaign, fund, and appeal.

When you process the Donor Giving Analysis, think in terms of time periods. The panel compares gift amounts within the time period you select with the donor's giving for that same previous time period (and in the case of **Recovered**, two periods ago). In the example below, "This calendar yr" is selected in the **Date range** field for 2002 to process the panel results.

	Repeated Donor	Increased Donor	Decreased Donor	New Donor	Recovered Donor	No Donation
2000					$75	
2001	$50	$100	$50			$50
2002	$50	$150	$25	$75	$50	

Repeated Donor — $50 displays in the panel results (donor has given the same amount this year as last year)

Increased Donor — $150 displays in the panel results (donor has given more this year than last)

Decreased Donor — $25 displays in the panel results (donor has given less this year than last)

New Donor — $75 displays in the panel results (donor has not given in the last two years)

Recovered Donor — $50 displays in the panel results (donor gave two years ago, but did not give last year)

No Donation — The donor is not included in the panel results (donor has not given a gift this year)

Once you process the Donor Giving Analysis, the panel continues to display on the Dashboard page, unless you hide or delete it. For more information about hiding a panel, see "Hide a panel" on page 28. For more information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Do not show gifts less than				For example, if you want to include only gifts in the amount of $100 or higher, enter $100.

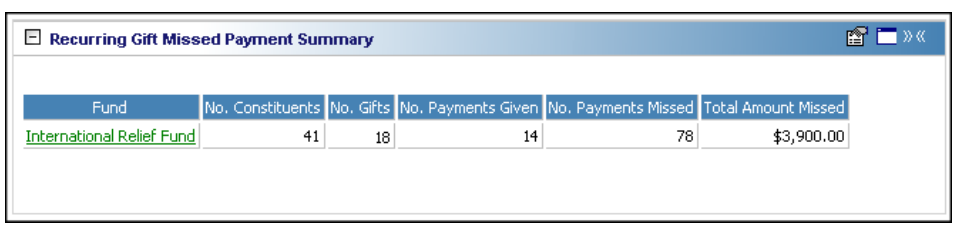
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include				Comes from the Bio 2 tab on the constituent record.
Breakdown by				Option includes Constituent Code
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Campaigns to include				Select at least one campaign, fund, appeal, or solicitor to increase processing speed.
Funds to include				Select at least one campaign, fund, appeal, or solicitor to increase processing speed.
Appeals to include				Select at least one campaign, fund, appeal, or solicitor to increase processing speed.

Recurring Gift Missed Payment Summary

You can use the Recurring Gift Missed Payment Summary to determine gift amounts to which your donor have committed, but not yet paid. More specifically, this Dashboard panel processes information for recurring gifts with consecutive missed payments. You can report on recurring gifts that have never been paid, gifts with at least one payment, or all recurring gifts, regardless of the number of payments. If a payment has been made, the number of missed payments is calculated from the last payment made.

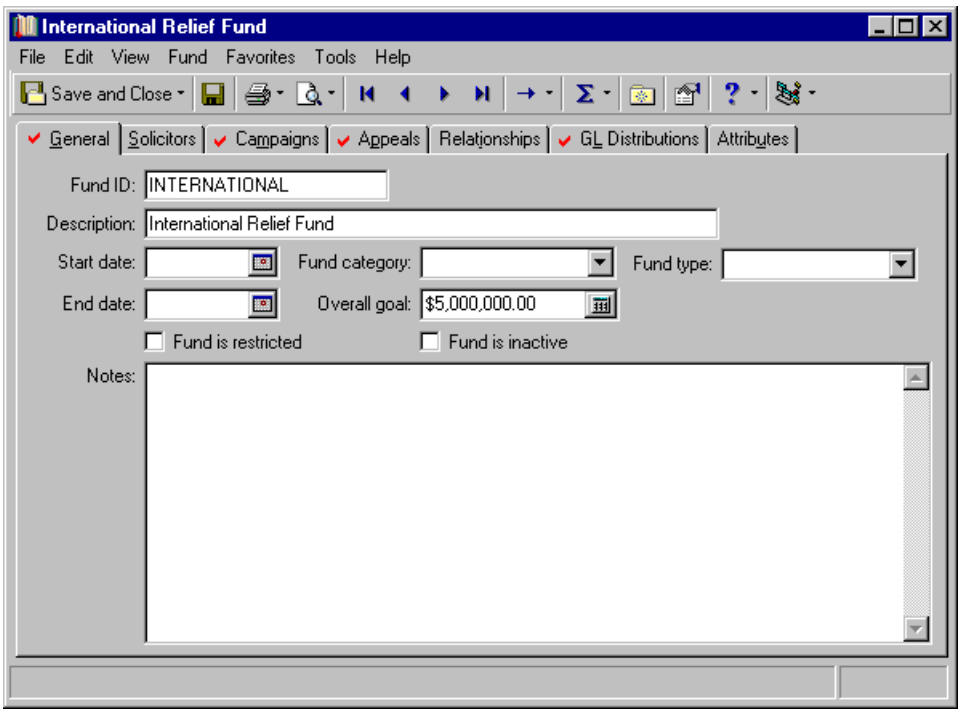
For example, your organization is falling short of your goal for the International Relief Fund and your Director asked you to research why. Process the Recurring Gift Missed Payment Summary to find out details about donors who never paid on a recurring gift or recurring gifts with at least one payment (or all recurring gifts, regardless of the number of payments).



Fund	No. Constituents	No. Gifts	No. Payments Given	No. Payments Missed	Total Amount Missed
International Relief Fund	41	18	14	78	$3,900.00

Note: The first column on the left of the Dashboard panel is determined by your selection in the **Summarize by** field on the Edit Recurring Gift Missed Payment Summary Panel screen. For more information, see the following table in this section.

You can click the fund name in the **Fund** column to open the record. When you do this, you can view information about the fund or make changes to the fund record.



Once you process the Recurring Gift Missed Payment Summary, the panel continues to display on the Dashboard page, unless you hide or delete it. For more information about hiding a panel, see “Hide a panel” on page 28. For more information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Consecutive payments missed as of				Options include: Today, Yesterday, Tomorrow, Last day of this week, Last day of last week, Last day of next week, Last day of this month, Last day of last month, Last day of next month, Last day of this qtr, Last day of last qtr, Last day of next qtr, Last day of this calendar yr, Last day of last calendar yr, Last day of next calendar yr, Last day of this fiscal yr, Last day of last fiscal yr, or Last day of next fiscal yr

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Minimum number of missed payments				Enter the minimum number of consecutive missed payments since the last payment made for your panel.
Include these recurring gifts				Options include: Recurring gifts with no payments, Recurring gifts with at least one payment, or All recurring gifts, regardless of the number of payments
Summarize by	Selection in this field automaticall y defaults in column format in the panel results		Panel sorts by selection in this field (in alphabetical order)	Options include: Campaign, Fund, Appeal, Package, Constituent Code, Solicitor, Pay method

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Breakdown by frequency				Examples of frequency are weekly, monthly, or annually (comes from the Transactions screen on a recurring gift record).
Output				Options include: Table, Graph, or Table and Graph
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Campaigns to include				Select at least one campaign, fund, or appeal to increase processing speed.
Funds to include				Select at least one campaign, fund, or appeal to increase processing speed.
Appeals to include				Select at least one campaign, fund, or appeal to increase processing speed.
Gift status to include				Options include: Active, Held, or Terminated
Pay methods to include				Options include: Cash, Personal Check, Business Check, Credit Card, Direct Debit, or Other

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	No. Constituents	No. Constituents		Calculates the number of constituents included in the panel.
	No. Gifts	No. Gifts		Calculates the number of gifts included in the panel.
	No. Payments Given	No. Payments Given		Calculates the number of payments that have been made for the recurring gifts in the panel.
	No. Payments Missed	No. Payments Missed		Calculates the number of payments that have been missed for the recurring gifts in the panel.
	Total Missed Amount	Total Missed Amount		Calculates the total gift amount your organization has not received because of missed recurring gift payments.

Recurring Gift Amendment Summary

A Recurring Gift Amendment Summary panel displays summarized information about amendments in your database. For example, you can filter on your two largest campaigns for the current week to determine if any recurring gifts have been upgraded or downgraded through amendments.

Recurring Gift Amendment Summary

Campaign	Amount	Previous Amount	Variance	Variance Percentage
Annual Campaign	$190.00	$140.00	$50.00	35.71%
Capital Campaign	$2,000.00	$1,250.00	$750.00	60.00%
	$2,190.00	$1,390.00	$800.00	57.55%

Note: Amounts are calculated for each column by which you select to summarize. For example, if you select to summarize by Campaign, the **Amount** column adds together all amendment amounts for the Annual Campaign and the Capital Campaign, individually. The blue row is the total calculation of these amounts.

To correctly understand the Recurring Gift Amendment Summary panel, make sure you know what the calculated amounts in each column represent. The **Amount** column calculates the gift amount on the Amendment tabs. The **Previous Amount** column calculates the gift amount on the previous amendments (if there are multiple amendments) or the original gift amount on the Gift tabs (if there is only one amendment).

The **Variance** column calculates the **Amount** column minus the **Previous Amount** column. If a recurring gift has multiple amendments, variance is the difference between the amount of the current amendment and the amount of the previous amendment. If a recurring gift has only one amendment, variance is the difference between the amount of the amendment and the original amount of the gift. If the **Variance** amount is in parenthesis '( )', this indicates amendment gift amounts are less than previous gift amounts — an overall downgrade for your recurring gifts. The **Variance Percentage** column represents the percentage change between current amendments and previous amendments (or the original gift amount if there is only one amendment).

When you click the "+" next to the **Campaign** column (or any other column by which you select to summarize), you can view details for the frequency of recurring gifts (such as weekly, monthly, or annually).

Recurring Gift Amendment Summary

Campaign	Amount	Previous Amount	Variance	Variance Percentage
Annual Campaign	$190.00	$140.00	$50.00	35.71%
Frequency	*Amount*	*Previous Amount*	*Variance*	*Variance Percentage*
Annually	$150.00	$100.00	$50.00	50.00%
Monthly	$40.00	$40.00		0.000%
Capital Campaign	$2,000.00	$1,250.00	$750.00	60.00%
Frequency	*Amount*	*Previous Amount*	*Variance*	*Variance Percentage*
Weekly	$2,000.00	$1,250.00	$750.00	60.00%
	$2,190.00	$1,390.00	$800.00	57.55%

Once you process the Recurring Gift Amendment Summary, the panel continues to display on the Dashboard page, unless you hide or delete it. For more information about hiding a panel, see "Hide a panel" on page 28. For more information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Amendment date				Options include: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Summarize by	Selection in this field automaticall y defaults in column format in the panel results		Panel sorts by selection in this field (in alphabetical order)	Options include: Campaign, Fund, Appeal, Package, Constituent Code, Solicitor, Pay method
Output				Options include: Table, Graph, or Table and Graph
Campaigns to include				Select at least one campaign, fund, or appeal to increase processing speed.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Funds to include				Select at least one campaign, fund, or appeal to increase processing speed.
Appeals to include				Select at least one campaign, fund, or appeal to increase processing speed.
Amendment types to include				Options include: Upgrade (increase amount), Downgrade (decrease amount), or Same (unchanged amount)

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include				Comes from the Bio 2 tab on the constituent record.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Pay methods to include				Options include: Cash, Personal Check, Business Check, Credit Card, Direct Debit, or Other

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Amount	Amount		Calculates the gift amount on the Amendment tabs.
	Previous Amount	Previous Amount		Calculates the gift amount on the previous amendments (if there are multiple amendments) or the original gift amount on the Gift tabs (if there is only one amendment) .
	Variance	Variance		Calculates the **Amount** column minus the **Previous Amount** column.
	Variance Percentage	Variance Percentage		Change between current amendments and previous amendments (or the original gift amount if there is only one amendment) .

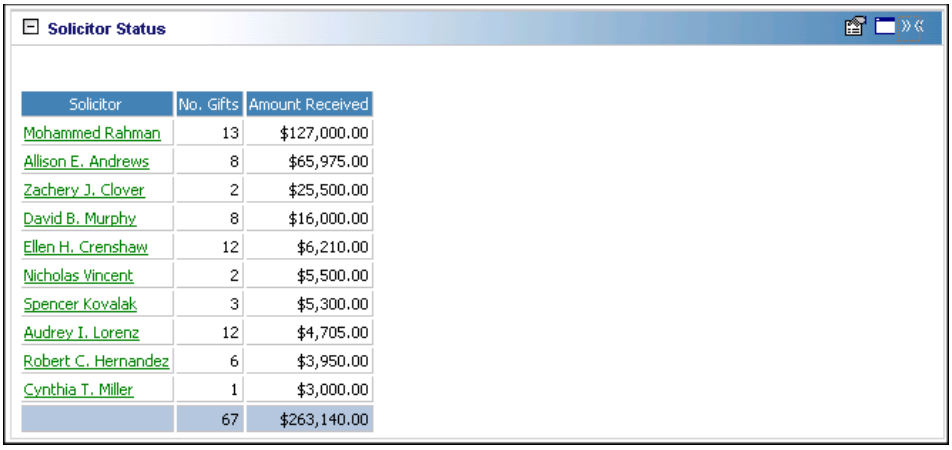
Solicitor

Use the following solicitor Dashboard panels to analyze and monitor your solicitors' progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Solicitor Status

The Solicitor Status panel allows you to view, analyze, and monitor your solicitors' progress as they solicit prospective constituents. By using a "Top" or "Bottom" filter, you can view solicitors based on their rank in percent or numbers for the gift amounts or number of gifts your organization receives.

For example, you want to view the top ten solicitors who raised the most money this week. You can process the results you need by selecting top 10 solicitors by gift amount in the **Include only [ ] [ ] [ ] by [ ]** field on the Edit Solicitor Status Panel, along with the date range you need. Once the Solicitor Status panel displays on the Dashboard page, you have the exact information you requested. For more information about using the creating a panel, see "Create a new Dashboard panel" on page 12.



Solicitor Status

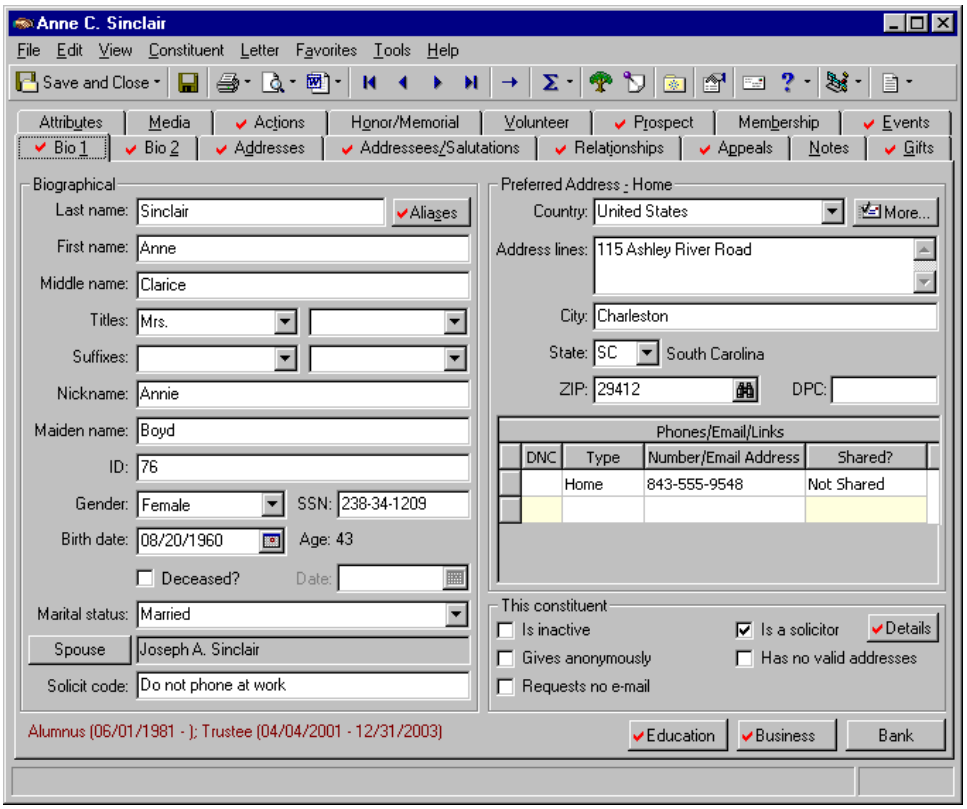
Solicitor	No. Gifts	Amount Received
Mohammed Rahman	13	$127,000.00
Allison E. Andrews	8	$65,975.00
Zachery J. Clover	2	$25,500.00
David B. Murphy	8	$16,000.00
Ellen H. Crenshaw	12	$6,210.00
Nicholas Vincent	2	$5,500.00
Spencer Kovalak	3	$5,300.00
Audrey I. Lorenz	12	$4,705.00
Robert C. Hernandez	6	$3,950.00
Cynthia T. Miller	1	$3,000.00
	67	$263,140.00

You can further limit your panel results by selecting to include specific gift types, campaigns, funds, appeals, or solicitors.

Any selections you make on the Edit Solicitor Status Panel save automatically. These selections do not change unless you edit or delete the panel from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

The gift information you view on the Solicitor Status panel on the Dashboard page is gift information your organization receives as a result of your solicitor's efforts.

Click the solicitor name in the **Solicitor** column of the panel results to open the solicitor's constituent record. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the panel results on the Dashboard page, see "View or modify a record from panel results" on page 26.



Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Include only				Options include: Top, Bottom, Percent of Solicitors, or Number of Solicitors
Count row				Enter a number in this blank field.
by				Options include: Gift Amount or Number of Gifts
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.
Campaigns to include				Select at least one campaign, fund, appeal, or solicitor to increase processing speed.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Funds to include				Select at least one campaign, fund, appeal, or solicitor to increase processing speed.
Appeals to include				Select at least one campaign, fund, appeal, or solicitor to increase processing speed.
Solicitors to include	Solicitor		Solicitor	Select at least one campaign, fund, appeal, or solicitor to increase processing speed. If you do not select anything in the **Include only** field, the summary sorts by Solicitor.
		Solicitor Rank	Solicitor Rank	The summary sorts by Solicitor Rank if you make a selection in the **Include only** field.

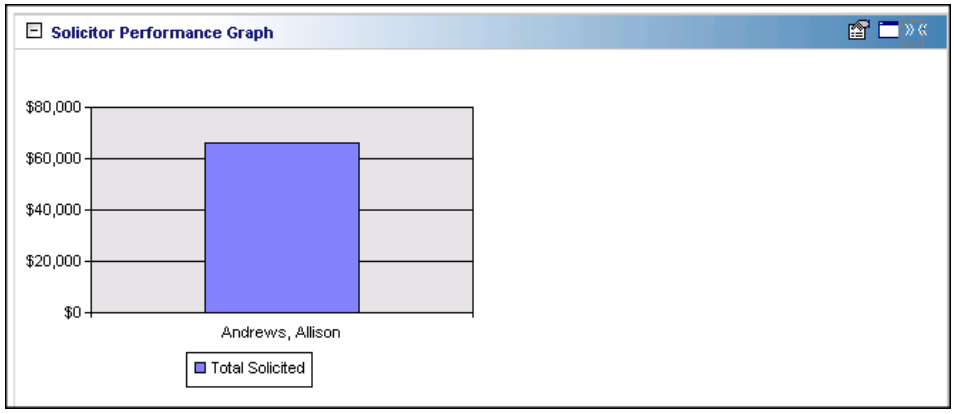
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	No. Gifts	No. Gifts		If the gift is a split gift, it is only counted one time for this column.
	Amount Received	Amount Received		Sum of amounts in **Amount** field on gift record.
		No. Proposal (only if you use the optional module *Prospect Research Managemen t*)		Sums the number of times the solicitor's name appears in the **Solicitors** field on the proposal record.
		Total Proposal Amount (only if you use the optional module *Prospect Research Managemen t*)		Amounts from the **Amount expected** field on the Proposal record are used in calculation.
		No. Actions		Sums the number of times the solicitor's name appears in the **Solicitor** field on the Actions tab.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		No. Participants		Sums the number of times the solicitor's name appears in the **Solicitor** field on the participant record.
		No. Assignments		Sums the number of assignments on the Assignments tab within the **Details** button on the Bio 1 tab of the constituent record.

Solicitor Performance Graph

Create a Solicitor Performance Graph to determine the performance of your solicitors. With the Solicitor Performance Graph, you can monitor the total amount of gifts for your solicitors. By using the **Date Range** field, you can analyze this for current or last week, month, quarter, calendar year, or fiscal year.

When a solicitor requests to find out how much credit she has received for securing contributions, you can print a copy of the Solicitor Performance Graph for her. For example, Allison Andrews requests to find out the total amount of gifts credited to her for her solicitations so far this fiscal year. To provide her with the information she needs, create the Solicitor Performance Graph. For more information about creating Dashboard panels, see "Create a new Dashboard panel" on page 12.



The **Columns to Show** for this panel are by default, “Solicitor” and “Total Solicited”.

Any selections you make on the Edit Solicitor Performance Graph Panel save automatically. These selections do not change unless you edit or delete the graph from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Solicitors to include	Solicitor			You must select at least one solicitor to process results. Select at least one campaign, fund, or solicitor to increase the processing speed.
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Campaigns to include				Select at least one campaign, fund, or solicitor to increase the processing speed.
Funds to include				Select at least one campaign, fund, or solicitor to increase the processing speed.
Solicitors to include	Solicitor	Solicitor		Select at least one campaign, fund, or solicitor to increase the processing speed.
	Total Gift Amt.			Calculates the total gift amount per solicitor.

Membership

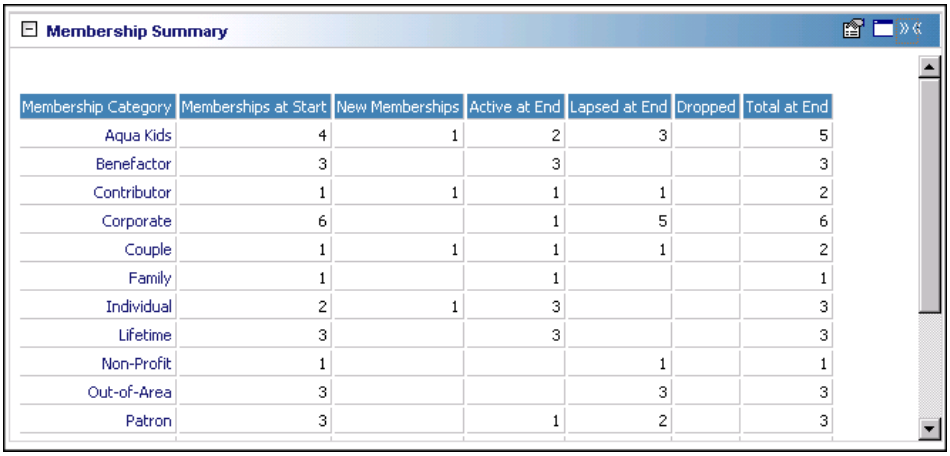
Use the following membership Dashboard panels to analyze and monitor your membership's progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Membership Summary

Note: For more information about *Membership Management*, see the *Membership Data Entry Guide*.

If you use the optional module *Membership Management*, you can process the Membership Summary to view and monitor membership information. The Membership Summary can be used to view membership categories and member status information, such as Active, Lapsed, and Dropped for a certain date range.

You can use the Membership Summary to quickly view a history of membership activity for a certain amount of time. For example, last week ended a quarterly membership drive for your organization. By selecting "Last quarter" from the **Date range** field, selecting all membership categories, and selecting to view all fields in the **Columns to Show** row, you can process the Membership Summary to analyze the exact results you need. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.



Membership Summary

Membership Category	Memberships at Start	New Memberships	Active at End	Lapsed at End	Dropped	Total at End
Aqua Kids	4	1	2	3		5
Benefactor	3		3			3
Contributor	1	1	1	1		2
Corporate	6		1	5		6
Couple	1	1	1	1		2
Family	1		1			1
Individual	2	1	3			3
Lifetime	3		3			3
Non-Profit	1			1		1
Out-of-Area	3			3		3
Patron	3		1	2		3

Warning: The Membership Summary counts memberships and not members. For example, one constituent renews her Family membership, and lists her husband as a Joint Member. This information is stored in the membership record, and her membership counts only one time in the Membership Summary.

Be aware that the Membership Summary counts memberships and not members. For example, David Murphy renews his Family membership during the membership drive, and adds his wife as a Joint Member. You record this information on his Membership record. His membership counts only one time in this Membership Summary example.

Any selections you make on the Edit Membership Summary Panel save automatically. These selections do not change unless you edit or delete the Membership Summary from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

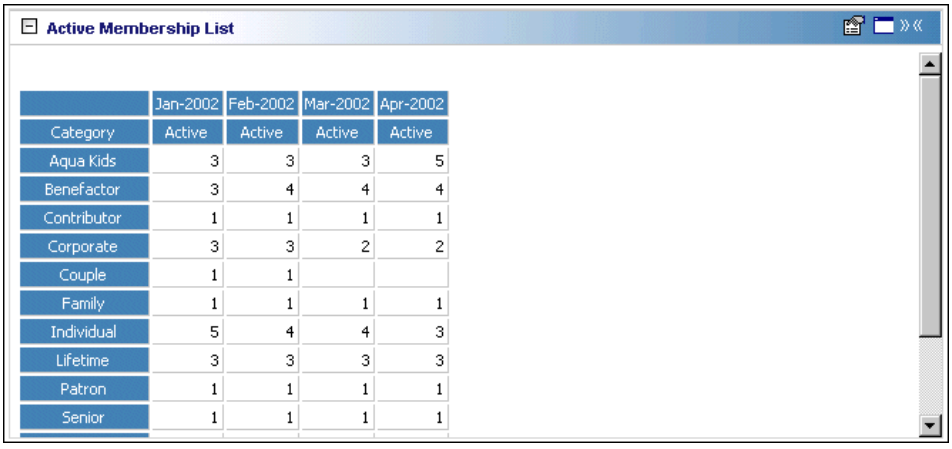
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Membership categories to include	Membership Category		Membership Category	Filters using the **Category** field on the membership record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Memberships at Start	Memberships at Start		Number of memberships at the start of the **Date range**.
	New Memberships	New Memberships		Number of memberships during the **Date range**.
	Active at End	Active at End		Number of memberships active at the end of the **Date range**.
	Lapsed at End	Lapsed at End		Number of memberships lapsed at the end of the **Date range**.
	Dropped	Dropped		Number of memberships dropped during the **Date range**.
		Renewals		Number of memberships renewed during the **Date range**.
		Rejoins		Number of memberships rejoined during the **Date range**.
	Total at End	Total		Includes Active and Lapsed

Active Membership List

Note: For more information about *Membership Management*, see the *Membership Data Entry Guide*.

If you use the optional module *Membership Management*, you can use the Active Membership List to identify trends in your membership categories and analyze other important information about your active members. For example, you can use this panel to inform board members where the strengths and weaknesses are with the different membership levels at your organization, based on active membership numbers. By analyzing the information in the Active Membership List panel results, you and your board members can brainstorm over ideas for increasing membership numbers.



Active Membership List

	Jan-2002	Feb-2002	Mar-2002	Apr-2002
Category	Active	Active	Active	Active
Aqua Kids	3	3	3	5
Benefactor	3	4	4	4
Contributor	1	1	1	1
Corporate	3	3	2	2
Couple	1	1		
Family	1	1	1	1
Individual	5	4	4	3
Lifetime	3	3	3	3
Patron	1	1	1	1
Senior	1	1	1	1

When you create the Active Membership List, you can view the Membership Category, the number of Active members and the number of Joined members. You can filter by Week, Month, Quarter, Calendar Year, or Fiscal Year, and the Membership Category.

Any selections you make on the Edit Active Membership List Panel save automatically. These selections do not change unless you edit or delete the Active Membership List from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Total by				List includes: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods				Enter a number in this field to designate how many periods you want to view. For example, if you select "Week" in the **Total by** field and "5" in this field, panel results include active members from the past five weeks.
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Membership Categories to Include	Membership Category		Membership Category	Filters by using the **Category** field on the membership record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output				Options include: Table, Graph, or Table and Graph
	Active			Calculates the number of active members.
		Joins		Calculates the number of new, active members.

Event

Use the following event Dashboard panels to analyze and monitor your events' progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Event Summary

Note: For more information about *Event Management*, see the *Event Management Data Entry Guide*.

If you use the optional module *Event Management*, you can process the Event Summary to monitor the status and progress of your events. You can process this summary for one event or multiple events based on the selections you make in the **Events to include** filter. The Event Summary views important information about an event, such as actual income, expense amounts, registrants, guests, and sponsors.

For example, you can use the Event Summary to analyze information for the number of invitees and the capacity you plan to host. You can automatically calculate the amount of people you invited to your event versus event's capacity. To do this, after you filter your event on the Edit Event Summary Panel, be sure to include the **No. Invited**, **Capacity**, and **% Capacity** fields in **Columns to Show**. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.

When you create the Event Summary, all registrants, sponsors, and guests are a part of the results. In addition, all participants are part of the Event Summary regardless of the status (for example Paid, Bill later, Complimentary) on the participant record.

Any selections you make on the Edit Event Summary Panel save after you click **OK**. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Variance in Event Summary

Variance in the Event Summary can potentially use multiple output fields for its calculations. **Variance** always includes the **Goal** amount. If you select **Actual Income** or **Projected Income** for the output, it is included in the **Variance**. If both or neither of the incomes are present, **Actual Income** is included in the **Variance**. Finally, if **Expenses** is in the output, it is included in the **Variance** calculation.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Events to include	Event		Event	Filters using the **Name** field on the Event record.
Output				Options include: Table, Graph, or Table and Graph
	Goal	Goal		Defaults from the **Overall goal** field on the event record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Actual Income	Actual Income		Includes: Other Donations, Registration Fees, and Sponsoring Pledges. Gift types include: Pledge and MG Pledge payments, and Recurring Gift transactions.
		Projected Income		Gift types include: Pledges, MG Pledges, or Recurring Gifts. Only Recurring Gifts with a status of Active are considered for the summary.
	Expenses	Expenses		Expenses in Dashboard are taken from the **Expense** column on the Expense tab in the event record; not the **Paid** or **Budgeted** column.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Variance	Variance		For more information about **Variance**, see "Variance in Event Summary" on page 140.
		No. Invited		Defaults from the **No. invited** field on the General tab of the event record.
		Capacity		Defaults from the **Capacity** field on General tab of the event record.
		% Capacity (compared to No. Invited)		(No. invited / Capacity) x 100
		No. Registered		From **Registrants** tree view on Participant tab in event record.
		No. Attended		Sum of participants with **Participant has attended** marked on General 1 tab of the participant record.

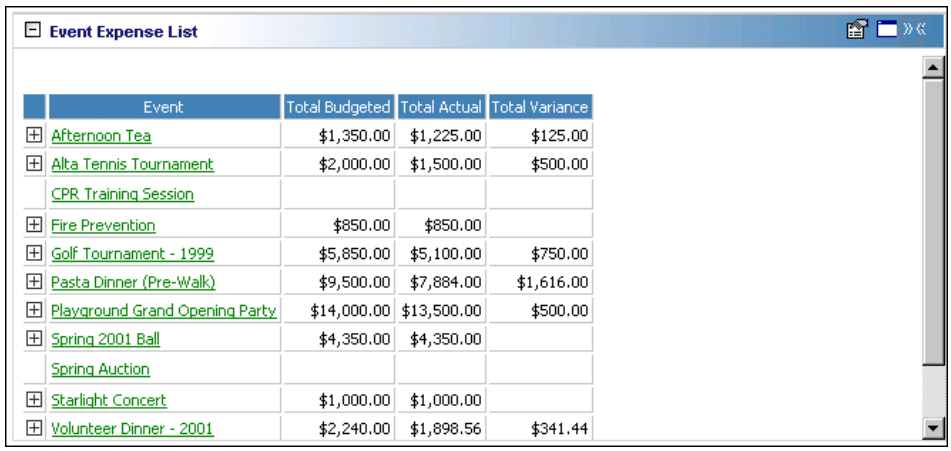
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		% Invited Attended (compared to No. Invited)		(No. Attended/ No. Invited) x 100
		% Registered Attended (compared to Registered)		(No. Attended/ No. Registered) x 100
		Sponsors		From **Sponsors** tree view on Participant tab in event record.

Event Expense List

Note: For more information about *Event Management*, see the *Event Management Data Entry Guide*.

If you use the optional module *Event Management*, you can create the Event Expense List panel to track expenses as they accumulate for an event. By monitoring expenses throughout all stages of your event planning, you can make sure an event stays within your budget.

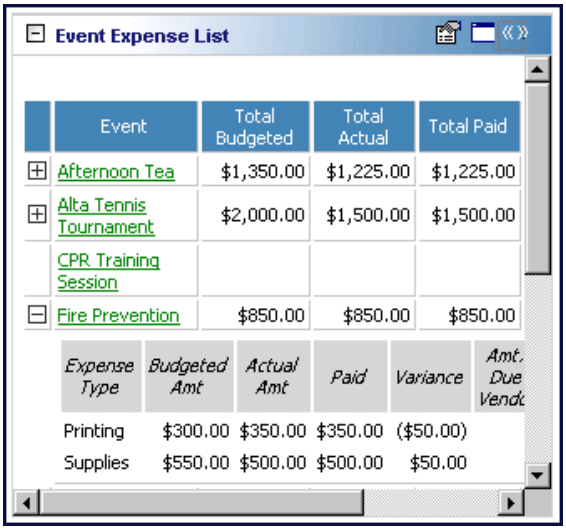
You can view the event name, **Total Budgeted amount**, **Total Added amount**, and **Total Variance amount** (which is the Total Budgeted amount minus the Total Added amount) on the Event Expense List panel results.



Event Expense List

Event	Total Budgeted	Total Actual	Total Variance
Afternoon Tea	$1,350.00	$1,225.00	$125.00
Alta Tennis Tournament	$2,000.00	$1,500.00	$500.00
CPR Training Session			
Fire Prevention	$850.00	$850.00	
Golf Tournament - 1999	$5,850.00	$5,100.00	$750.00
Pasta Dinner (Pre-Walk)	$9,500.00	$7,884.00	$1,616.00
Playground Grand Opening Party	$14,000.00	$13,500.00	$500.00
Spring 2001 Ball	$4,350.00	$4,350.00	
Spring Auction			
Starlight Concert	$1,000.00	$1,000.00	
Volunteer Dinner - 2001	$2,240.00	$1,898.56	$341.44

You can also view **Total Paid**, **Total Due Vendor**, **Expense Type**, **Budgeted Amt**, **Actual Amt**, **Paid**, **Variance**, **Amt. Due Vendor**, **Vendor**, **Phone**, and **Email**. To view the majority of this information, click the square to the left of the event name. The panel results expand to show the details of the Event Expense List.



To open an event record, click the event name. By opening the event record, you can view other event information and make any necessary changes to the event record directly from the Dashboard panel results. To change expense information on the event record, select the Expenses tab.

Any selections you make on the Edit Expense List Panel save automatically. These selections do not change unless you edit or delete the Event Expense List from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Events to include	Event			Filters using the **Name** field on the Event record.
	Total Budgeted	Total Budgeted		Calculates the **Budgeted** column from the Expenses tab on the event record.

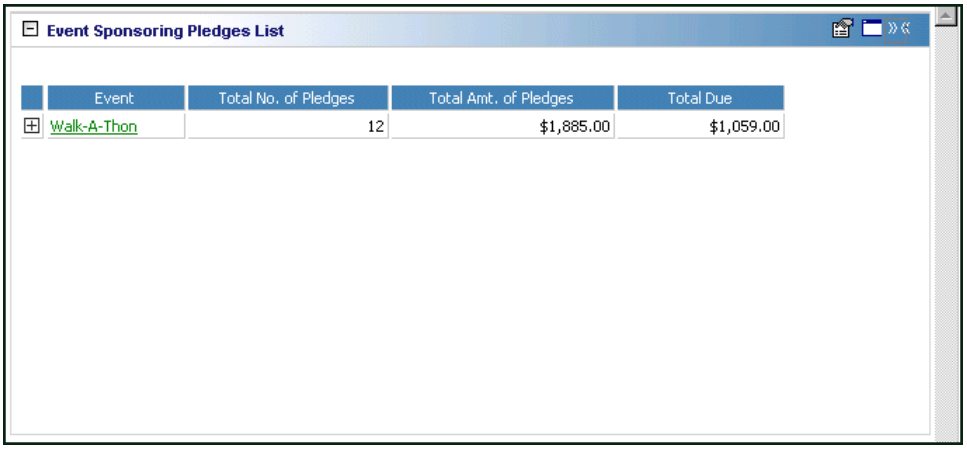
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Total Actual	Total Actual		Calculates the **Expense** column from the Expenses tab on the event record.
		Total Paid		Calculates the **Paid** column from the Expenses tab on the event record.
	Total Variance	Total Variance		Total Budgeted minus Total Actual
		Total Due Vendor		Total Actual minus Total Paid
	Expense Type	Expense Type	Expense Type	Defaults from Expenses tab on the event record.
	Budgeted Amt	Budgeted Amt		Defaults from Expenses tab on the event record.
	Actual Amt	Actual Amt		Defaults from Expenses tab on the event record.
		Paid		Defaults from Expenses tab on the event record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Variance	Variance		Budgeted Amt minus Actual Amt
		Amt. Due Vendor		Actual Amt minus Paid
		Vendor	Vendor	Defaults from the Participants tab on the event record.
		Phone		Defaults from the vendor's constituent record.
		Email		Defaults from the vendor's constituent record.
		DNC		If the phone is marked "Do Not Contact" on the constituent record, the Do Not Contact warning appears in the column.

Event Sponsoring Pledges List

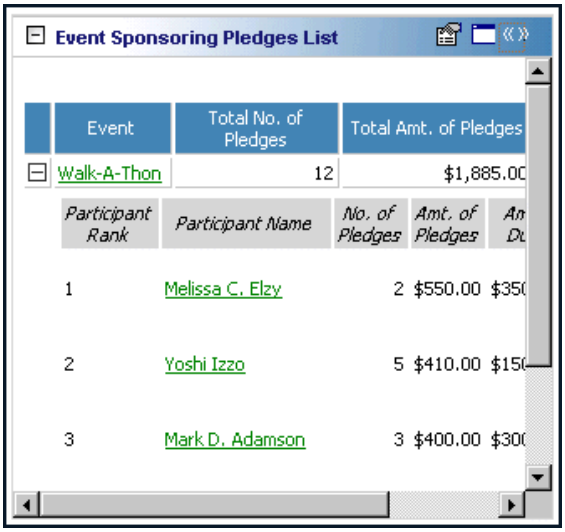
Note: For more information about *Event Management*, see the *Event Management Data Entry Guide*.

A sponsoring pledge is a donation made on behalf of a registrant, guest, or sponsor participating in a sporting event. For example, your organization is holding a walk-a-thon for colon cancer awareness. All proceeds are going to colon cancer research. The participants of your event ask as many people as possible to donate a certain amount of money if they complete the walk. You want to quickly see how the participants are doing in gathering sponsoring pledges. If you use the optional module *Event Management*, you can run the Event Sponsoring Pledges List, to view the total number of pledges and the total amount of pledges.



Note: Sponsoring pledges can be given only for participants of a sporting event.

You can expand the list to view the participants who individually make up these totals. For each participant, you can view the **Participant Rank**, **Participant Name**, **No. of Pledge**, **Amt. of Pledges**, **Amt. Due**, **Phone**, and **Email**.



You can open an event record by clicking the event name in the panel results on the Dashboard page. You can also open a participant record by clicking the participant in the **Participant Name** column in the panel results. To view the participant record, click the square next to the event name. Once the list expands, click the participant to view the participant record.

Any selections you make on the Edit Event Sponsoring Pledges List Panel save automatically. These selections do not change unless you edit or delete the Event Actions List from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the panel.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Events to include	Event			To process for specific events, select **Selected**. Move events to the **Include these Events** box for processing. To process for a group of events, select **Query**. Click the binoculars to search for a query.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
Only list participants with outstanding sponsoring pledges				Only processes event records with outstanding sponsoring pledges.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Include only				Options include: Top and Bottom
Count row				Enter a number in this blank field.
by				Options include: Pledge Amount or No. of Pledges
	Total No. of Pledges	Total No. of Pledges		Calculates the total number of sponsoring pledges in the panel results.
	Total Amt. of Pledges	Total Amt. of Pledges		Calculates the total amount of sponsoring pledges in the panel results.
		Total Due		Calculates the outstanding total pledge amount due in in the panel results.
		Participant Rank	Participant Rank	Participant rank per event displays.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Participant Name	Participant Name	Participant Name	Defaults from the General 1 tab of the participant records, accessed from the Participants tab of the event record.
	No. of Pledges	No. of Pledges		Calculates the total number of sponsoring pledges per event record.
	Amt. of Pledges	Amt. of Pledges		Calculates the total amount of sponsoring pledges per event record.
	Amt. Due	Amt. Due		Calculates the outstanding total pledge amount due per event record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Phone		Defaults the participant's phone information from the General 1 tab of the participant record, accessed from the Participants tab in the event record.
		Email		Defaults the participant's email information from the General 1 tab of the participant record, accessed from the Participants tab in the event record.
		DNC		If the phone is marked "Do Not Contact" on the constituent record, the Do Not Contact warning appears in the column.

Custom Metric Reports

If you integrate ***The Raiser's Edge 7*** with ***Blackbaud NetCommunity***, you can use the following custom metric report dashboard panels to analyze, compare, and track revenue, constituent, and email activity over time. With these Dashboard panels, you can evaluate the effectiveness of your organization's fundraising, marketing, and engagement efforts.

You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. To choose this page, select a Dashboard on the Dashboard page action bar.

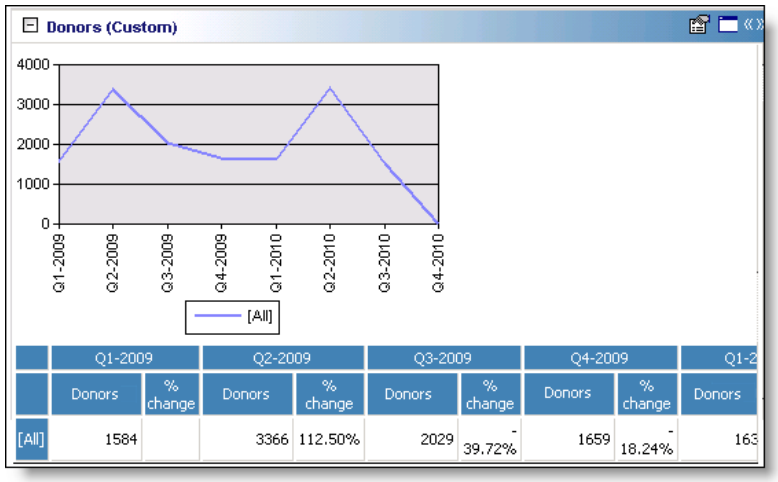
Donors (Custom)

You can use the Donors (Custom) panel to analyze the number of constituents who have a donation record in your database over a specified period of time. For example, your organization has increased marketing efforts and you want to evaluate its impact in the number of donors over the last four years to determine its effectiveness.

You can edit the parameters of the Donors (Custom) panel to display specific gift information and period of time for which to display the data. By default, the panel displays results for all gifts over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Donors (Custom) Panel screen, each **Gift series** field represents a separate line of data on the Donors (Custom) panel, and you can select up to four different series of gift data to compare. Use the **Gift series** fields to select a query or selection of gifts to display, such as to compare the number of online donors, offline donors, and total number of donors.

By default, the panel displays columns in the graph to represent the gift data and period of time you selected. On the Edit Donors (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Donors (Custom) Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see "Open and edit a panel" on page 20. For information about how to delete a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year
Number of Periods			4	To select the number of periods to display, click the calculator button.
Gift series			All	
Gift series			All	
Gift series			All	
Gift series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

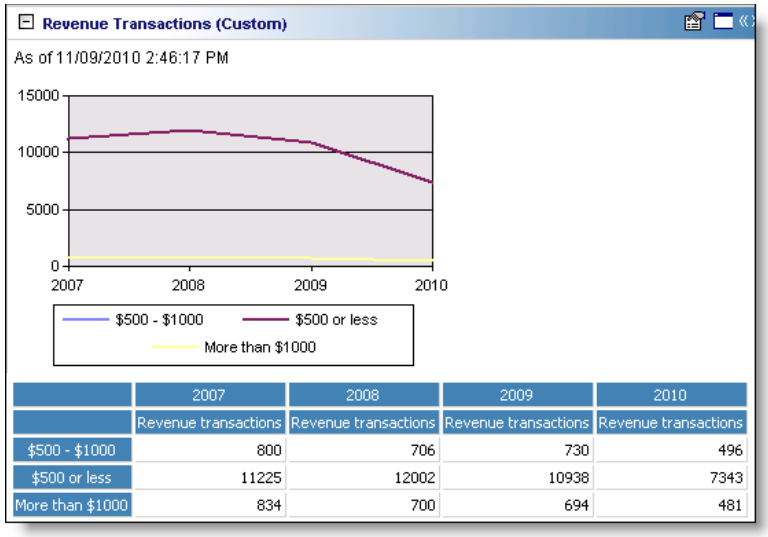
Revenue Transactions (Custom)

You can use the Revenue Transactions (Custom) panel to analyze the number of gifts given to your organization over a specified period of time. For example, you can evaluate the difference in the number of gifts over the last four years to determine the trend in giving, and whether campaigns are necessary to solicit more gifts.

You can edit the parameters of the Revenue Transactions (Custom) panel to display specific gift information and period of time for which to generate data. By default, the panel displays results for all revenue transactions over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Revenue Transactions (Custom) Panel screen, each **Gift series** field represents a separate line of data on the Revenue Transactions (Custom) panel, and you can select up to four different series of gift data to compare. Use the **Gift series** fields to select a query or selection of gifts to display, such as to show only gifts of $100 or more.

By default, the panel displays columns in the graph to represent the gift data and period of time you selected. On the Edit Revenue Transactions (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	2007	2008	2009	2010
	Revenue transactions	Revenue transactions	Revenue transactions	Revenue transactions
$500 - $1000	800	706	730	496
$500 or less	11225	12002	10938	7343
More than $1000	834	700	694	481

Any selections you make on the Edit Revenue Transactions Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year
Number of Periods			4	To select the number of periods to display, click the calculator button.
Count Method			Per period	Options include: Per period or Total
Gift series			All	
Gift series			All	
Gift series			All	
Gift series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

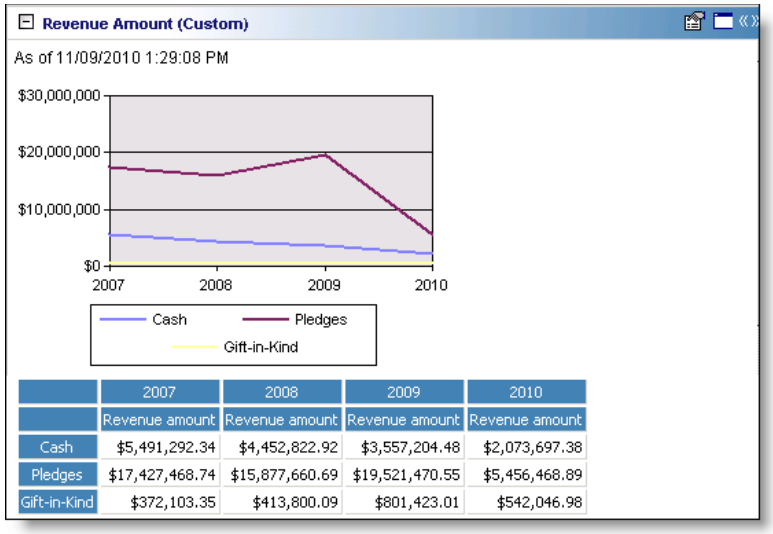
Revenue Amount (Custom)

You can use the Revenue Amount (Custom) panel to view the total amount of money your organization raised over a period of time to assess your organization's fundraising efforts. For example, you can edit the parameters on the Edit Revenue Amount Panel screen to view the total amount of money your organization raised each week, month, quarter, calendar year, or fiscal year.

You can edit the parameters of the Revenue Amount (Custom) panel to display specific gift information and period of time for which to generate data. By default, the panel displays results for all revenue transactions over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Revenue Amount (Custom) Panel screen, each **Gift series** field represents a separate line of data on the Revenue Amount (Custom) panel, and you can select up to four different series of gift data to compare. Use the **Gift series** fields to select a query or selection of gifts to display, such as to compare the total amount raised in pledges and in cash donations.

By default, the panel displays columns in the graph to represent the gift data and period of time you selected. On the Edit Revenue Amount (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	2007	2008	2009	2010
	Revenue amount	Revenue amount	Revenue amount	Revenue amount
Cash	$5,491,292.34	$4,452,822.92	$3,557,204.48	$2,073,697.38
Pledges	$17,427,468.74	$15,877,660.69	$19,521,470.55	$5,456,468.89
Gift-in-Kind	$372,103.35	$413,800.09	$801,423.01	$542,046.98

Any selections you make on the Edit Revenue Amount (Custom) Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year
Number of Periods			4	To select the number of periods to display, click the calculator button.
Gift series			All	
Gift series			All	
Gift series			All	
Gift series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

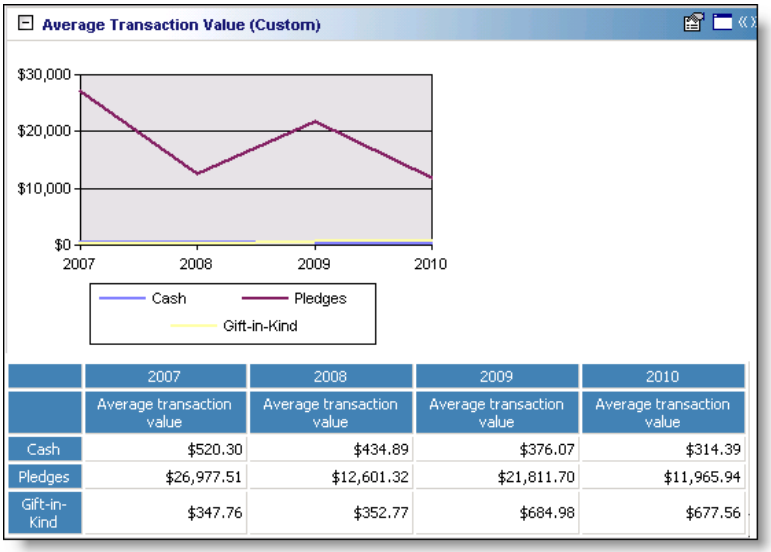
Average Transaction Value (Custom)

You can use the Average Transaction Value (Custom) panel to analyze the average gift amount given to your organization over a period of time to assess your organization's fundraising efforts. For example, you can use the filters on the Edit Average Transaction Value Panel screen to view the average gift value for each week, month, quarter, calendar year, or fiscal year.

You can edit the parameters of the Average Transaction Value (Custom) panel to display specific gift information and period of time for which to generate data. By default, the panel displays results for all revenue transactions over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Average Transaction Value (Custom) Panel screen, each **Gift series** field represents a separate line of data on the Average Transaction Value (Custom) panel, and you can select up to four different series of gift data to compare. Use the **Gift series** fields to select a query or selection of gifts to display, such as to show only pledges or cash donations.

By default, the panel displays columns in the graph to represent the gift data and period of time you selected. On the Edit Average Transaction Value (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	2007	2008	2009	2010
	Average transaction value	Average transaction value	Average transaction value	Average transaction value
Cash	$520.30	$434.89	$376.07	$314.39
Pledges	$26,977.51	$12,601.32	$21,811.70	$11,965.94
Gift-in-Kind	$347.76	$352.77	$684.98	$677.56

Any selections you make on the Edit Average Transaction Value Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

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Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Gift series			All	
Gift series			All	
Gift series			All	
Gift series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

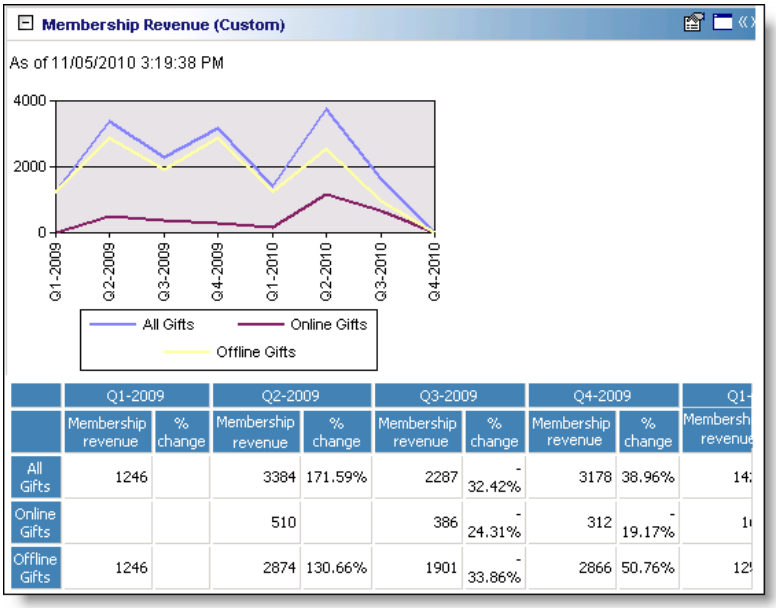
Membership Revenue (Custom)

You can use the Membership Revenue (Custom) panel to view the amount of revenue generated from membership fees. This allows you to analyze the success of membership programs over a period of time.

You can edit the parameters of the Membership Revenue (Custom) panel to display specific gift information and period of time for which to generate data. By default, the panel displays results for all revenue transactions over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Membership Revenue (Custom) Panel screen, each **Gift series** field represents a separate line of data on the Membership Revenue (Custom) panel, and you can select up to four different series of gift data to compare. Use the **Gift series** fields to select a query or selection of gifts to display, such as to show payments made toward different categories of membership.

By default, the panel displays columns in the graph to represent the gift data and period of time you selected. On the Edit Membership Revenue (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	Q1-2009		Q2-2009		Q3-2009		Q4-2009		Q1-
	Membership revenue	% change	Membership revenue	% change	Membership revenue	% change	Membership revenue	% change	Membersh revenue
All Gifts	1246		3384	171.59%	2287	-32.42%	3178	38.96%	14
Online Gifts			510		386	-24.31%	312	-19.17%	1
Offline Gifts	1246		2874	130.66%	1901	-33.86%	2866	50.76%	12

Any selections you make on the Edit Membership Revenue (Custom) Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Gift series			All	
Gift series			All	
Gift series			All	
Gift series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

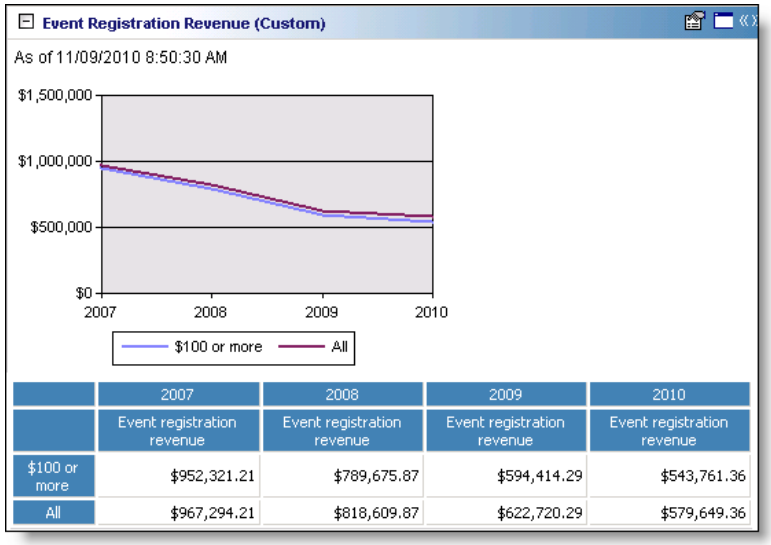
Event Registration Revenue (Custom)

You can use the Event Registration Revenue (Custom) panel to analyze the amount of money your organization received for payments toward registrations over a period of time. For example, you can compare how much money you received in registration fee payments over each of the last four years.

You can edit the parameters of the Event Registration Revenue (Custom) panel to display specific gift information and period of time for which to generate data. By default, the panel displays results for all revenue transactions over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Event Registration Revenue (Custom) Panel screen, each **Gift series** field represents a separate line of data on the Event Registration Revenue (Custom) panel, and you can select up to four different series of gift data to compare. Use the **Gift series** fields to select a query or selection of gifts to display, such as to show only payments toward event registrations of $100 or more.

By default, the panel displays columns in the graph to represent the gift data and period of time you selected. On the Edit Event Registration Revenue (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	2007	2008	2009	2010
	Event registration revenue	Event registration revenue	Event registration revenue	Event registration revenue
$100 or more	$952,321.21	$789,675.87	$594,414.29	$543,761.36
All	$967,294.21	$818,609.87	$622,720.29	$579,649.36

Any selections you make on the Edit Event Registration Revenue (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Gift series			All	
Gift series			All	
Gift series			All	
Gift series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

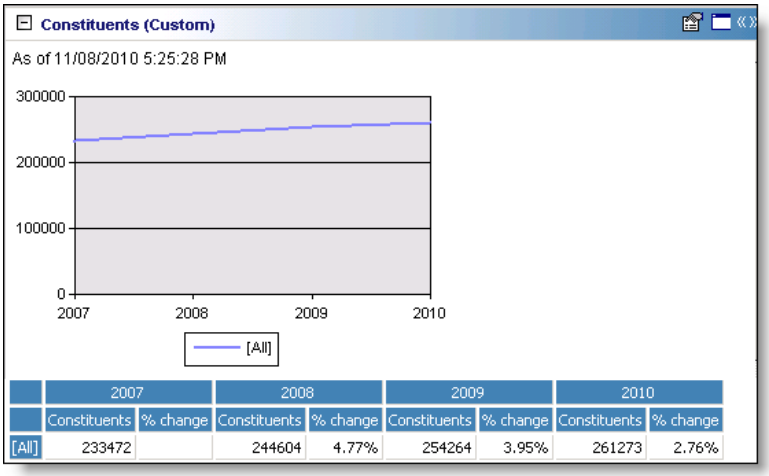
Constituents (Custom)

You can use the Constituents (Custom) panel to analyze the number of individual and organization constituents in your organization's database over a time period. For example, you can view the total number of constituents in your organization's database over each of the last four years to determine growth.

You can edit the parameters of the Constituents (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Constituents (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Constituents (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of gifts to display, such as to show only constituents of specified constituencies.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Constituents (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Constituents (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Count Method			Total	Options include: Per period or Total
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

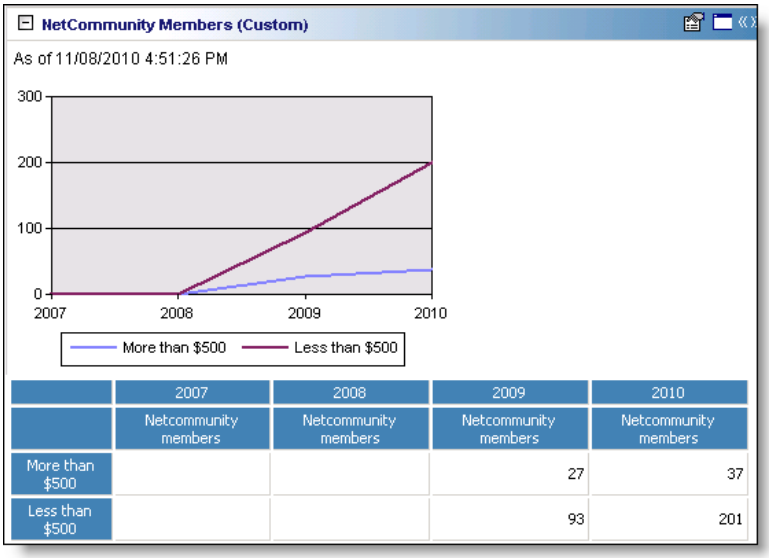
NetCommunity Members (Custom)

You can use the NetCommunity Members (Custom) panel to analyze the number of members in your organization's online community over a period of time. For example, you can view the number of ***Blackbaud NetCommunity*** members in the last four years to determine growth.

You can edit the parameters of the NetCommunity Members (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit NetCommunity Members (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the NetCommunity Members (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of gifts to display, such as the number of ***Blackbaud NetCommunity*** members who gave a gift of $500 or more in the last four years.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit NetCommunity Members (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit NetCommunity Members (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Count Method			Total	Options include: Per period or Total
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

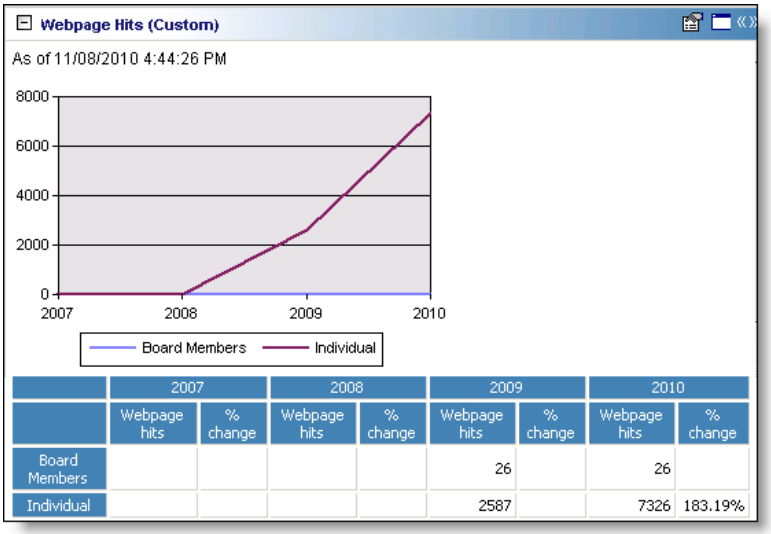
Webpage Hits (Custom)

You can use the Webpage Hits (Custom) panel to view the number of times your organization's website has been visited over a period of time. This information allows you to evaluate the success and popularity of your organization's website.

You can edit the parameters of the Webpage Hits (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Webpage Hits (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Webpage Hits (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as how many times constituents of a specific constituency visit your organization's webpage.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Webpage Hits (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	2007		2008		2009		2010	
	Webpage hits	% change	Webpage hits	% change	Webpage hits	% change	Webpage hits	% change
Board Members					26		26	
Individual					2587		7326	183.19%

Any selections you make on the Edit Webpage Hits Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel.For information about how to edit a panel, see "Open and edit a panel" on page 20. For information about how to delete a panel, see "Delete a panel" on page 39.

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Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

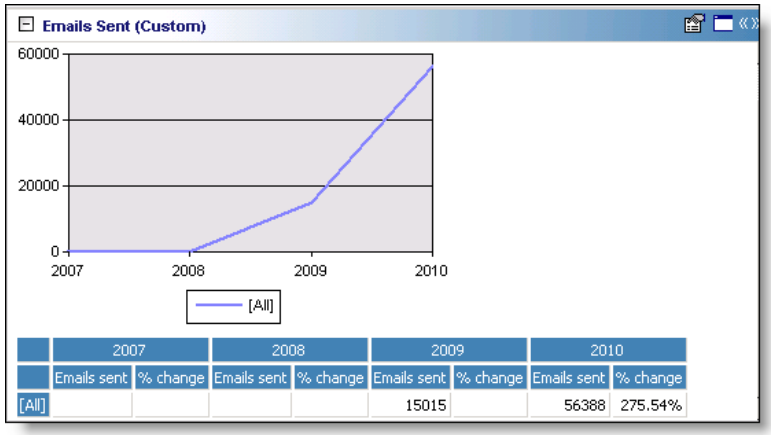
Emails Sent (Custom)

You can use the Emails Sent (Custom) panel to view the number of email messages sent to constituents through ***Blackbaud NetCommunity***, and evaluate the effectiveness of your organization's marketing efforts over a period of time.

You can edit the parameters of the Emails Sent (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Emails Sent (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Emails Sent (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as to show only results for constituents who have had membership renewal email messages sent to them.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Emails Sent (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Emails Sent (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel.For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year
Number of Periods			4	To select the number of periods to display, click the calculator button.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

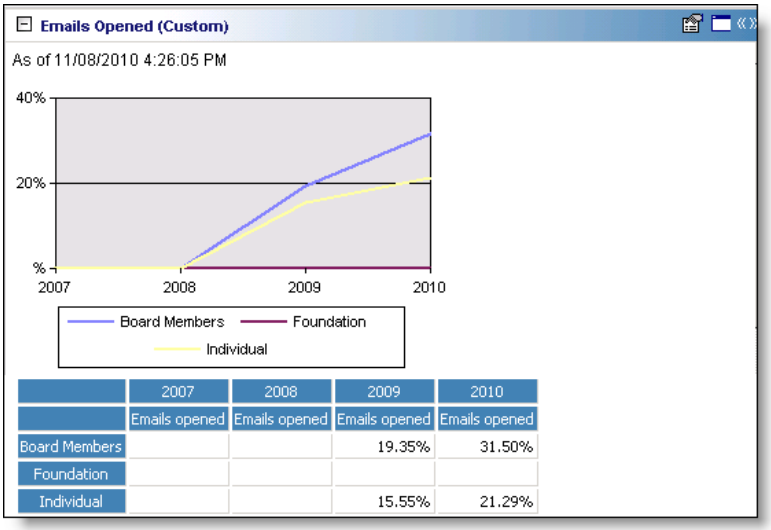
Emails Opened (Custom)

You can use the Emails Opened (Custom) panel to analyze the percent of ***Blackbaud NetCommunity*** emails opened by recipients over a period of time. For example, you can create a panel that displays the percent of email messages opened over the past year to evaluate the engagement of email recipients.

You can edit the parameters of the Emails Opened (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Emails Opened (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Emails Opened (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as to show results only for constituents who were recipients of membership renewal email messages.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Emails Opened (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



	2007	2008	2009	2010
	Emails opened	Emails opened	Emails opened	Emails opened
Board Members			19.35%	31.50%
Foundation				
Individual			15.55%	21.29%

Any selections you make on the Edit Emails Opened (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

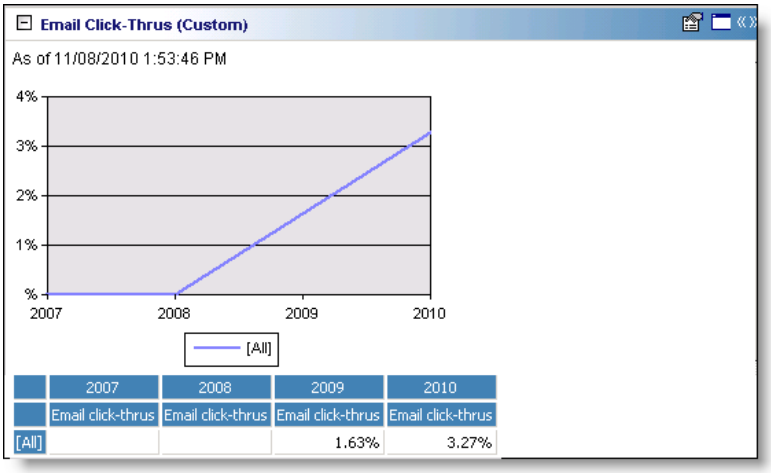
Email Click-Thrus (Custom)

You can use the Email Click-Thrus (Custom) panel to view the percentage of click-thrus on ***Blackbaud NetCommunity*** email sent to constituents from your organization. This panel allows you to analyze the engagement of email recipients and success of email messages over a period of time. For example, if your organization recently re-formatted an email update that is regularly sent to constituents, you can compare the number of click-thrus during the current month to previous months.

You can edit the parameters of the Email Click-Thrus (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Email Click-Thrus (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Email Click-Thrus (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as the percentage of major givers who click email links to access your organization's webpage.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Email Click-Thrus (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Email Click-Thrus (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

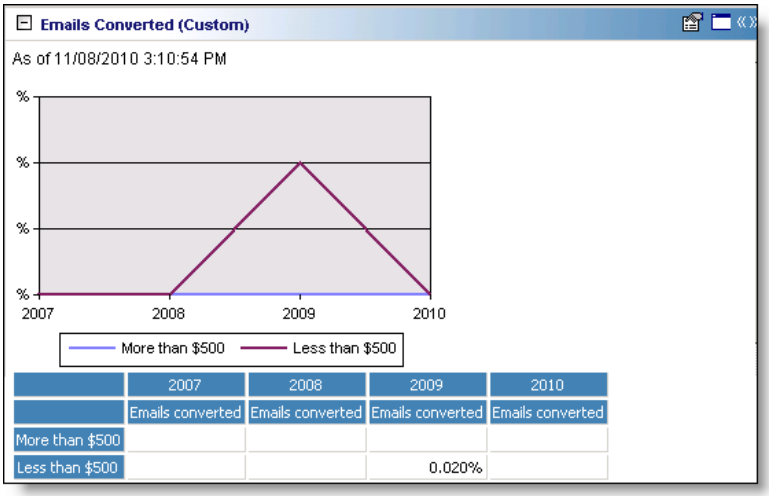
Emails Converted (Custom)

You can use the Emails Converted (Custom) panel to analyze the percentage of ***Blackbaud NetCommunity*** emails sent that resulted in a revenue transaction. This panel allows you to evaluate the success and engagement of your email audience over a period of time.

You can edit the parameters of the Emails Converted (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Emails Converted (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Emails Converted (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as the number of revenue transactions greater than $500 as a result of an email effort.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Emails Converted (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Emails Converted Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel.For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

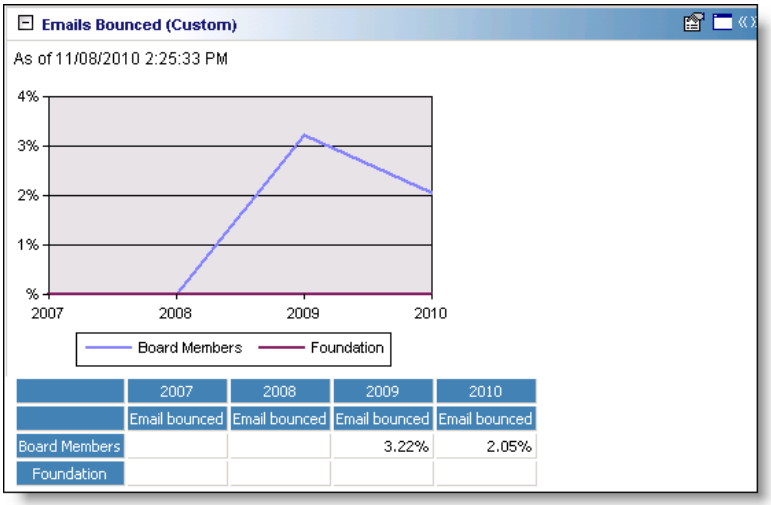
Emails Bounced (Custom)

You can use the Emails Bounced (Custom) panel to analyze the number of ***Blackbaud NetCommunity*** email messages that were sent, but could not be delivered. This panel allows you to evaluate the accuracy and effectiveness of your email subscriber list over a period of time.

You can edit the parameters of the Emails Bounced (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Emails Bounced (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Emails Bounced (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as the number of emails bounced that were sent to constituents of a specific constituency.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Emails Bounced (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Emails Bounced (Custom) Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

Email Addresses Added (Custom)

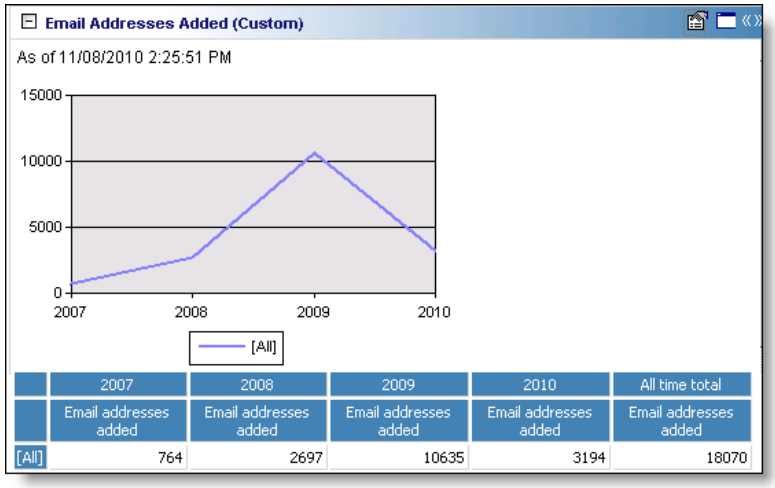
You can use the Email Addresses Added (Custom) panel to analyze the number of email addresses added or changed in your database over a period of time to measure the growth of your email list. For example, you can view the number of email addresses that have been added or changed in the past year, and the percent of change from month to month.

Email addresses not on the preferred address of the constituent, and email addressed marked as **Do Not Contact** are not included in this panel.

You can edit the parameters of the Email Addresses Added (Custom) panel to display specific constituent information and period of time for which to generate data. By default, the panel displays results for all constituents over the last four calendar years. You can also select whether the output of the panel displays as a table, graph, or a table and graph.

On the Edit Email Addresses Added (Custom) Panel screen, each **Constituent series** field represents a separate line of data on the Email Addresses Added (Custom) panel, and you can select up to four different series of constituent data to compare. Use the **Constituent series** fields to select a query or selection of constituents to display, such as to show only additions or updates to primary email addresses.

By default, the panel displays columns in the graph to represent the constituent data and period of time you selected. On the Edit Email Addresses Added (Custom) panel screen, you can edit the **Columns to show** parameter to add percent change to the panel.



Any selections you make on the Edit Email Addresses Added Panel screen save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Output			Table and Graph	Options include: Table, Graph, Table and Graph
Total by			Calendar Year	Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Number of Periods			4	To select the number of periods to display, click the calculator button.
Email types to include				Defaults from the **Type** column of the **Phone/Emails/Links** grid, on the Bio 1 tab of the constituent record.
Constituents series			All	
Constituents series			All	
Constituents series			All	
Constituents series			All	
Columns to show			Series, Analysis Criteria	This filter only appears if Output is Table or Table and Graph. Click **Select** to include Percent change in the columns to show.

Standard Metric Reports

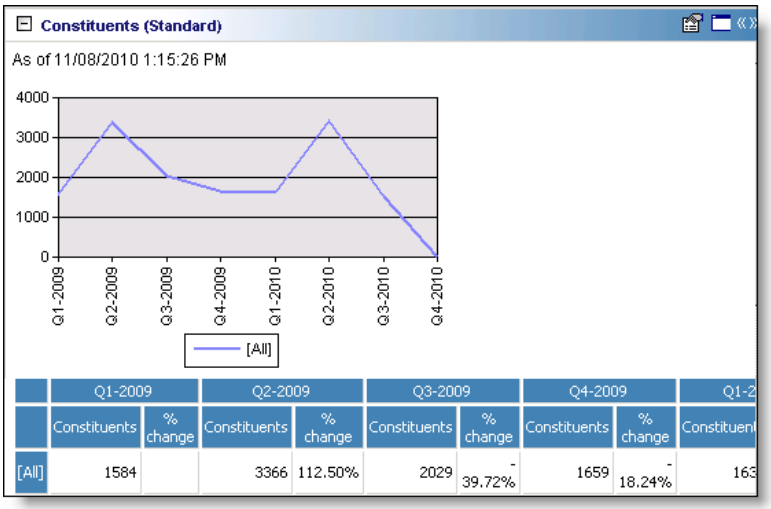
If you integrate ***The Raiser's Edge 7*** with ***Blackbaud NetCommunity***, you can use the following standard metric report dashboard panels to analyze, compare, and track revenue, constituent, and email activity over time. With these Dashboard panels, you can evaluate the effectiveness of your organization's fundraising, marketing, and engagement efforts.

You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. To choose this page, select a Dashboard on the Dashboard page action bar.

Constituents (Standard)

You can use the Constituents (Standard) panel to view your organization's overall number of individual constituents to analyze growth. This panel does not include information about organization constituents.

You cannot edit this panel. It is configured and locked to display the number of individual constituents in your organization's database over the most recent eight quarters. This panel also provides the percent of change from year to year.

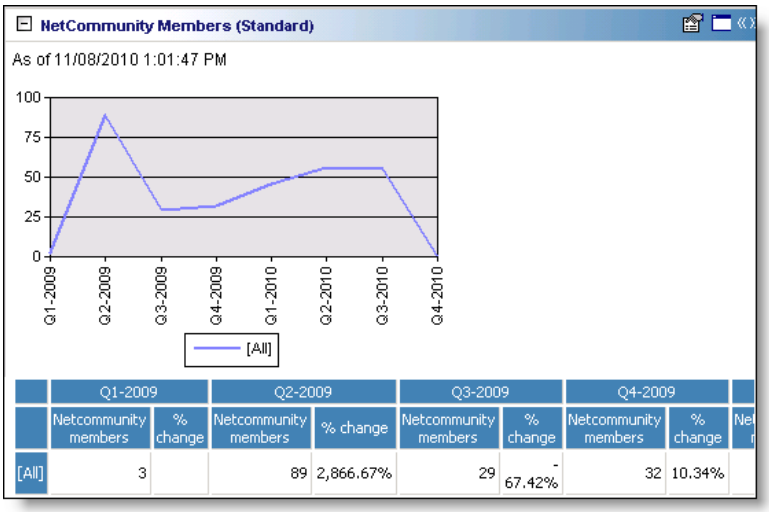


	Q1-2009		Q2-2009		Q3-2009		Q4-2009		Q1-2
	Constituents	% change	Constituents	% change	Constituents	% change	Constituents	% change	Constituen
[All]	1584		3366	112.50%	2029	-39.72%	1659	-18.24%	163

NetCommunity Members (Standard)

You can use the NetCommunity Members (Standard) panel to view your organization's online acquisition progress. This panel allows you to analyze the increase or decrease in ***Blackbaud NetCommunity*** members over a period of time.

You cannot edit this panel. It is configured and locked to display the number of NetCommunity members in your database over the most recent eight quarters. This panel also provides the percent of change from year to year.



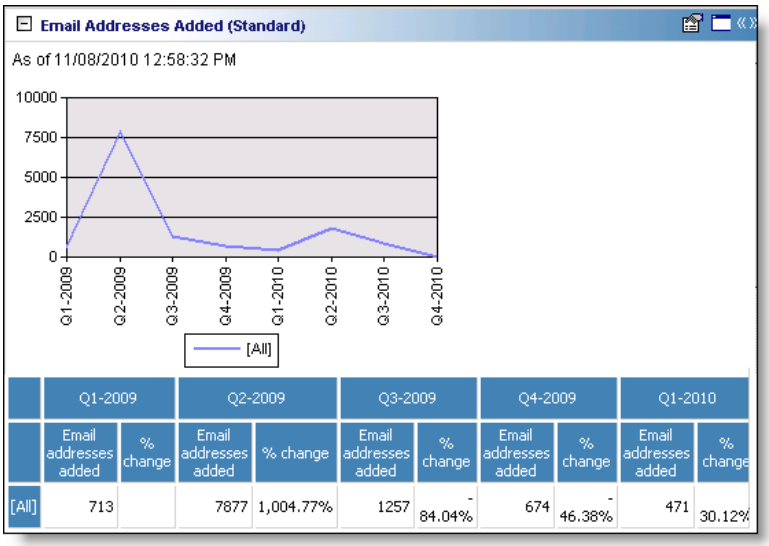
	Q1-2009		Q2-2009		Q3-2009		Q4-2009	
	Netcommunity members	% change	Netcommunity members	% change	Netcommunity members	% change	Netcommunity members	% change
[All]	3		89	2,866.67%	29	-67.42%	32	10.34%

Email Addresses Added (Standard)

This panel does not include organization email addresses.

You can use the Email Addresses Added (Standard) panel to view the number of email addresses stored in your organization's database. This panel allows you to analyze your organization's growth in email address tracking over a period of time. For example, as your organization increases its use of email solicitation, you can evaluate how well you maintain email address information.

By default, this panel includes all email address types in its output. On the Edit Email Addresses Added (Standard) Panel screen, you can select specific types of email addresses to include in the output. This panel is configured and locked to display the number of email addresses in your organization's database that have been added or updated over the most recent eight quarters. This panel also provides the percent of change from year to year.

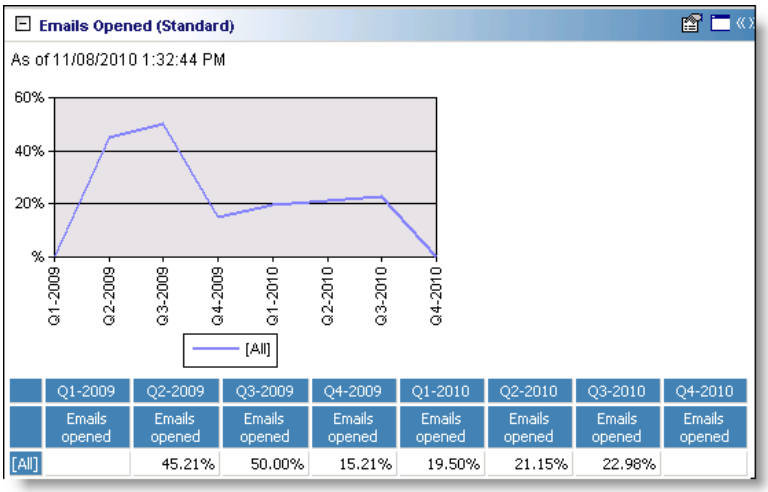


	Q1-2009		Q2-2009		Q3-2009		Q4-2009		Q1-2010	
	Email addresses added	% change	Email addresses added	% change	Email addresses added	% change	Email addresses added	% change	Email addresses added	% change
[All]	713		7877	1,004.77%	1257	-84.04%	674	-46.38%	471	30.12%

Emails Opened (Standard)

You can use the Emails Opened (Standard) panel to analyze the percent of ***Blackbaud NetCommunity*** emails opened by recipients over a period of time. This panel allows you to evaluate the effectiveness of your ***Blackbaud NetCommunity*** emails and your email audience.

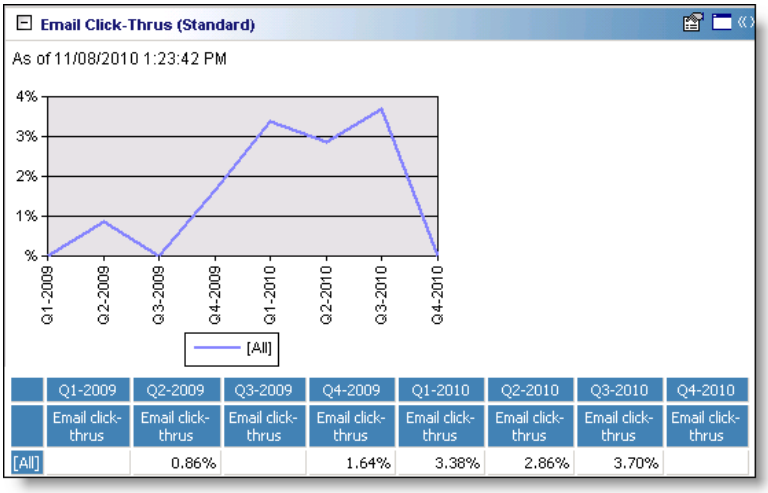
This panel is configured and locked to display the percent of ***Blackbaud NetCommunity*** emails opened over the most recent eight quarters. This panel can also provide the percent of change from year to year.



Email Click-Thrus (Standard)

You can use the Email Click-Thrus (Standard) panel to view the percentage of click-thrus on ***Blackbaud NetCommunity*** email sent to constituents from your organization. This panel allows you to analyze the engagement of email recipients and success of email messages over a period of time.

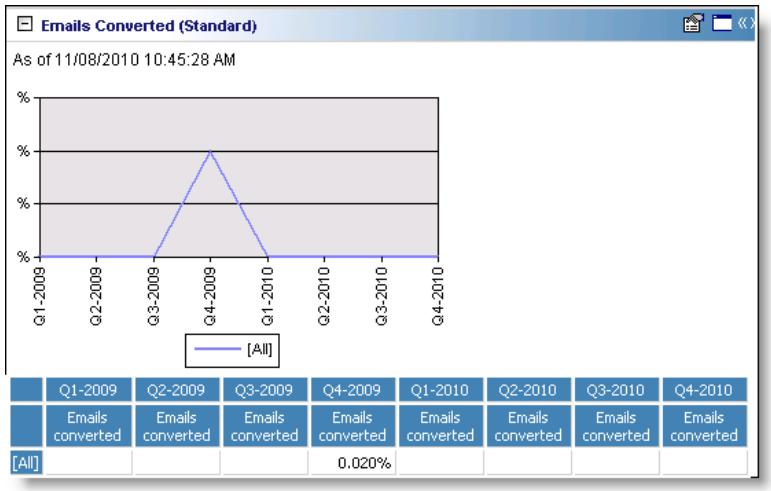
This panel is configured and locked to display the percent of click-thrus on ***Blackbaud NetCommunity*** emails over the most recent eight quarters. This panel can also provide the percent of change from year to year.



Emails Converted (Standard)

You can use the Emails Converted (Standard) panel to view the percentage of ***Blackbaud NetCommunity*** emails that were converted into a revenue transaction. This panel allows you to analyze the effectiveness of your emails toward donations.

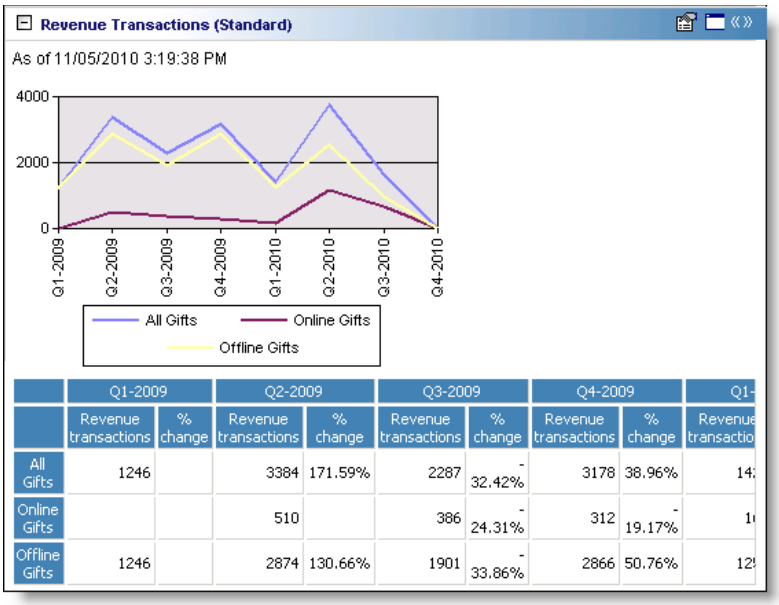
This panel is configured and locked to display the percent of ***Blackbaud NetCommunity*** emails that were converted into revenue transactions over the most recent eight quarters. This panel can also provide the percent of change from year to year.



Revenue Transactions (Standard)

You can use the Revenue Transactions (Standard) panel to view how many individual revenue transactions your organization received from your constituents. This panels allows you to analyze the overall participation of your constituents.

You cannot edit this panel. It is configured and locked to display the number of gifts given to your organization over the most recent eight quarters. It displays the total number of all gifts given, as well as separate totals for the number of gifts given online through ***Blackbaud NetCommunity***, and offline through ***The Raiser's Edge***. This panel also provides the percent of change from year to year.

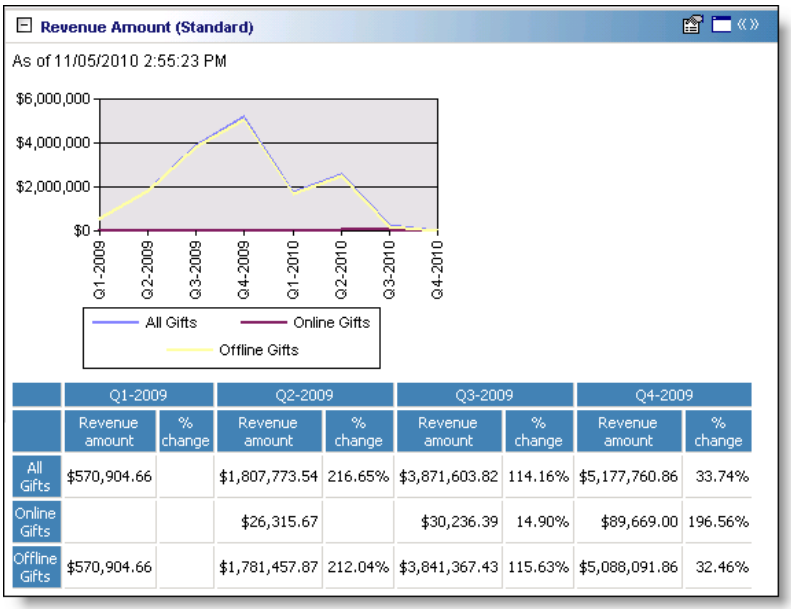


	Q1-2009		Q2-2009		Q3-2009		Q4-2009		Q1-
	Revenue transactions	% change	Revenue transactions	% change	Revenue transactions	% change	Revenue transactions	% change	Revenue transactio
All Gifts	1246		3384	171.59%	2287	-32.42%	3178	38.96%	14
Online Gifts			510		386	-24.31%	312	-19.17%	1
Offline Gifts	1246		2874	130.66%	1901	-33.86%	2866	50.76%	12

Revenue Amount (Standard)

You can use the Revenue Amount (Standard) panel to analyze your organization's overall donor engagement in terms of how much revenue you have raised.

You cannot edit this panel. It is configured and locked to display the total amount raised by your organization over the most recent eight quarters. It displays the total of all gifts given, as well as separate totals for gifts given online through ***Blackbaud NetCommunity***, and offline through ***The Raiser's Edge***. This panel also provides the percent of change from year to year.

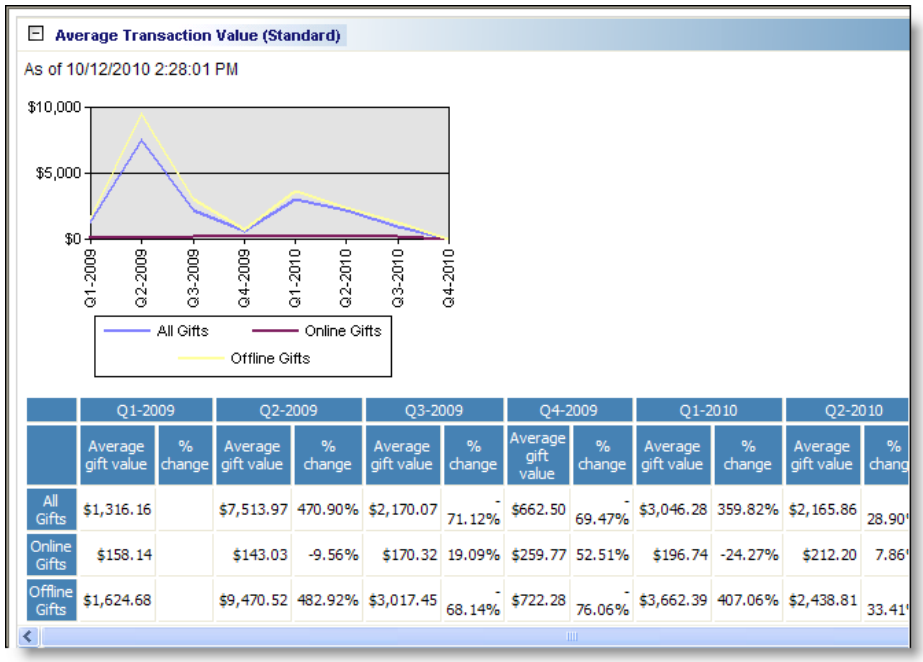


	Q1-2009		Q2-2009		Q3-2009		Q4-2009	
	Revenue amount	% change	Revenue amount	% change	Revenue amount	% change	Revenue amount	% change
All Gifts	$570,904.66		$1,807,773.54	216.65%	$3,871,603.82	114.16%	$5,177,760.86	33.74%
Online Gifts			$26,315.67		$30,236.39	14.90%	$89,669.00	196.56%
Offline Gifts	$570,904.66		$1,781,457.87	212.04%	$3,841,367.43	115.63%	$5,088,091.86	32.46%

Average Transaction Value (Standard)

You can use the Average Transaction Value (Standard) panel to analyze how much the average value of gifts given to your organization has increased or decreased since the previous year.

You cannot edit this panel. It is configured and locked to display the average value of gifts given to your organization over the most recent eight quarters. It displays the average gift value of all gifts given, as well as separate averages for gifts given online through ***Blackbaud NetCommunity***, and offline through ***The Raiser's Edge***. This panel also provides the percent of change from year to year.



	Q1-2009		Q2-2009		Q3-2009		Q4-2009		Q1-2010		Q2-2010	
	Average gift value	% change	Average gift value	% change	Average gift value	% change	Average gift value	% change	Average gift value	% change	Average gift value	% chang
All Gifts	$1,316.16		$7,513.97	470.90%	$2,170.07	-71.12%	$662.50	-69.47%	$3,046.28	359.82%	$2,165.86	28.90
Online Gifts	$158.14		$143.03	-9.56%	$170.32	19.09%	$259.77	52.51%	$196.74	-24.27%	$212.20	7.86
Offline Gifts	$1,624.68		$9,470.52	482.92%	$3,017.45	-68.14%	$722.28	-76.06%	$3,662.39	407.06%	$2,438.81	33.41

Proposal

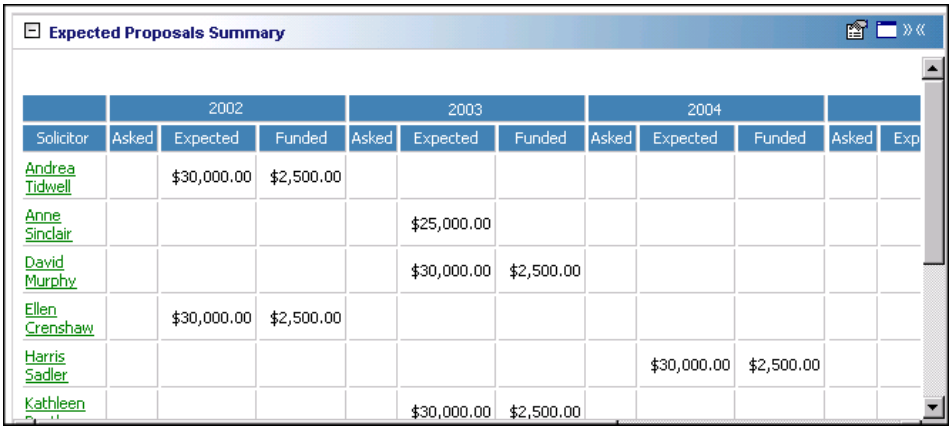
Use the following proposal Dashboard panels to analyze and monitor your proposal's progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Expected Proposals Summary

If you use the optional module *Prospect Research Management*, you can create the Expected Proposals Summary panel to analyze and predict what your organization can expect to receive in donations as a result of proposals. The summary can be broken down by solicitor or rating information. You can select to create the Expected Proposals Summary based on your current week, month, quarter, calendar year, or fiscal year.

If you select "Week" in the **Total by** field, the summary results contain the gifts your organization should receive in the next four weeks. If you select "Month", results include the next three months. Selecting "Quarter" includes the gifts you should receive in the next four quarters. If you select "Calendar Year" or "Fiscal Year", the Expected Proposals Summary results include gifts you should receive in the next five years.

You can use the Expected Proposals Summary to view information for specific solicitors and the donations your organization should receive because of their efforts. For example, your solicitors were your best asset last year for recruiting proposals. You anticipate a repeat of this success this year, and want to know the amounts you can expect so you can plan for your upcoming year. Generate the Expected Proposals Summary to predict your organization's income from proposals. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.

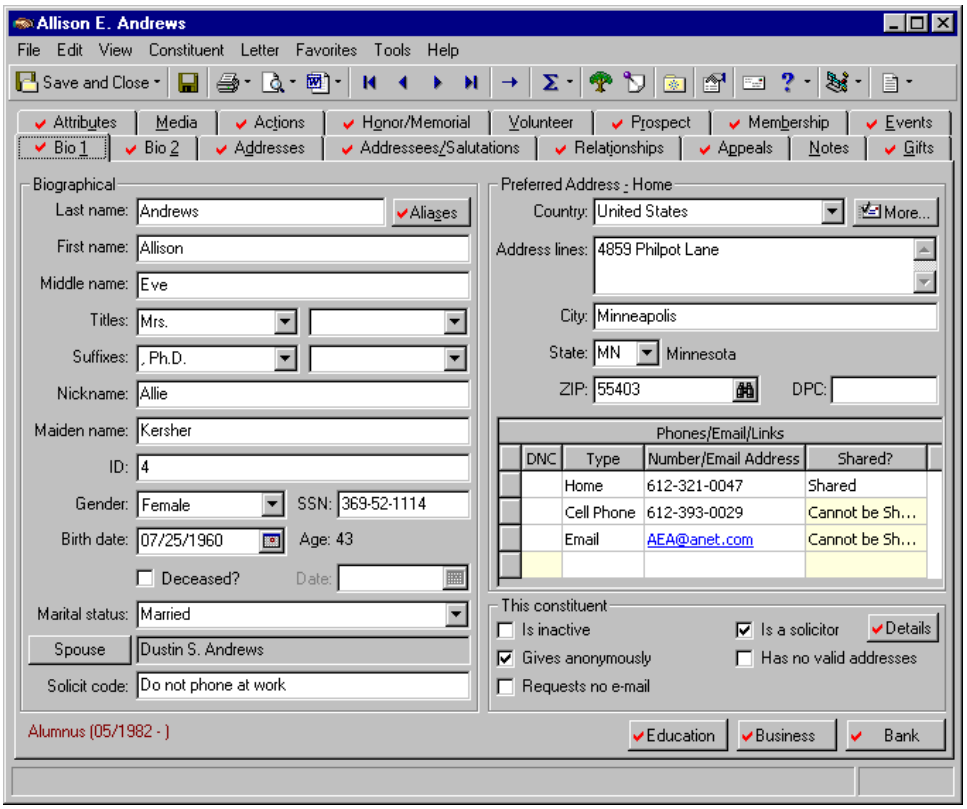


Expected Proposals Summary

	2002			2003			2004				
Solicitor	Asked	Expected	Funded	Asked	Expected	Funded	Asked	Expected	Funded	Asked	Exp
Andrea Tidwell		$30,000.00	$2,500.00								
Anne Sinclair					$25,000.00						
David Murphy					$30,000.00	$2,500.00					
Ellen Crenshaw		$30,000.00	$2,500.00								
Harris Sadler								$30,000.00	$2,500.00		
Kathleen					$30,000.00	$2,500.00					

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see "Dashboard Action Bars" on page 49.

After you process the Expected Proposals Summary, you can open the constituent record to obtain her address on the Bio 1 tab. Click a name in the panel results to open the constituent record. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the panel results on the Dashboard page, see “View or modify a record from panel results” on page 26.



Any selections you make on the Edit Expected Proposals Summary Panel save automatically. These selections do not change unless you edit or delete the summary from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know about your summary. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Total by				Options include: Week, Month, Quarter, Calendar Year, or Fiscal Year

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Breakdown by				Options include: Solicitor, Rating, Purpose, Classification, Prospect Status, Campaign, or Fund
Classifications to include	Classification (if selected in **Breakdown by** field)		Classification (if selected in **Breakdown by** field)	Defaults from the **Classification** field on the Prospect tab of the constituent record.
Prospect status to include	Prospect Status (if selected in **Breakdown by** field)		Prospect Status (if selected in **Breakdown by** field)	Defaults from the **Status** field on the Prospect tab of the constituent record.
Campaigns to include	Campaign (if selected in **Breakdown by** field)		Campaign (if selected in **Breakdown by** field)	Defaults from the **Campaign** field on the Prospect tab of the constituent record.
Funds to include	Fund (if selected in **Breakdown by** field)		Fund (if selected in **Breakdown by** field)	Defaults from the **Fund** field on the Prospect tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Solicitors to include	Solicitor (if selected in **Breakdown by** field)		Solicitor (if selected in **Breakdown by** field)	Defaults from the **Solictor(s)** field on the General tab of the proposal record.
Proposal ratings to include	Rating (if selected in **Breakdown by** field)		Rating (if selected in **Breakdown by** field)	Defaults from the **Rating** field on the General tab of the proposal record.
Include inactive proposals				If you mark this checkbox, proposal records with the **Proposal is inactive** checkbox marked are considered for the panel results.
	Ask Amount	Ask Amount		Sum of **Amount asked** field on the General tab of the proposal record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Expected Amount	Expected Amount		Sum of **Amount expected** field on the General tab of the proposal record.
	Funded Amount	Funded Amount		Sum of **Amount funded** field on the General tab of the proposal record.

Proposal Status

Note: For more information about *Prospect Research Management*, see the *Prospect Data Entry Guide*.

If you use the optional module *Prospect Research Management*, you can run a Proposal Status to analyze the progress of your proposals. The Proposal Status panel displays constituent and gift information your organization expects and receives as a result of proposals. For each constituent, you can select to view important aspects of the proposal, such as the solicitor, the last contact date, open actions, the ask date, and the date expected.

Note: When you create the Proposal Status, only proposals that do not have the **Prospect is inactive** checkbox marked on the Proposal tab of the proposal record are considered for the summary.

For example, one of your solicitors recently made a proposal to a prominent organization in your community, asking them to contribute $10,000 to your organization. You can process the Proposal Status to view the amount, date, and action information for the proposal. To do this, filter the constituent name in the **Constituents to include** row, and select “Ask Amount”, “Last Contact Date”, “Next Contact Date”, and “Open Actions”, along with “Constituent Name” and “Solicitor” from the **Columns to Show** list on the Edit Proposal Status Panel. For more information about creating a panel, see “Create a new Dashboard panel” on page 12.

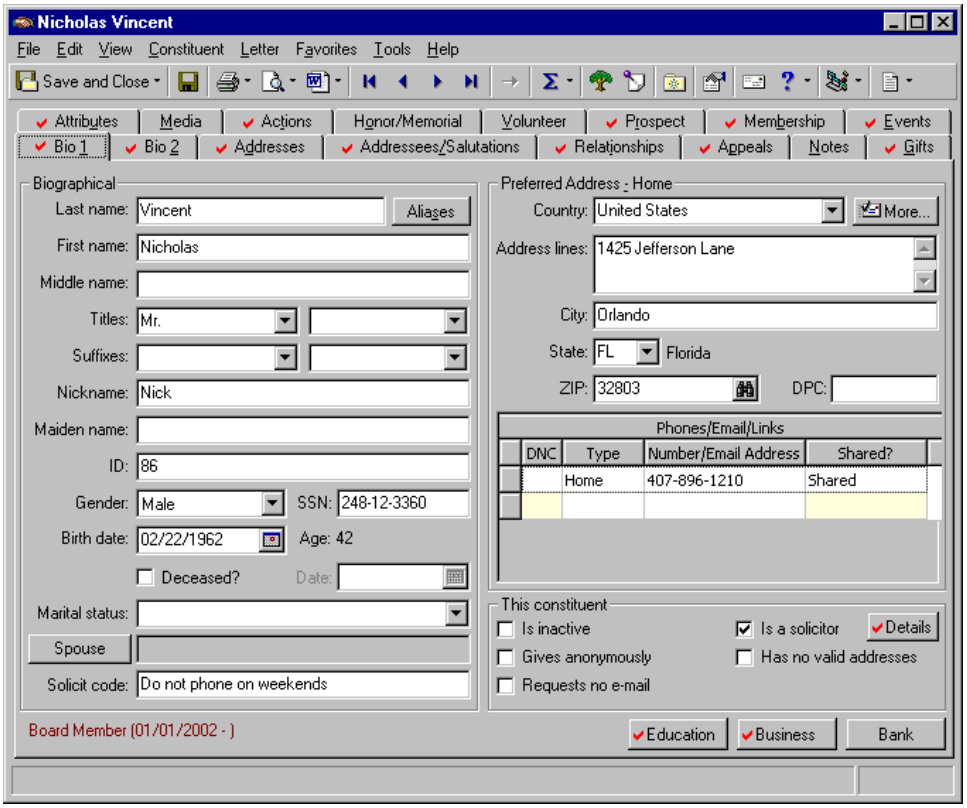
Proposal Status

Proposal	Constituent Name	Solicitor	Ask Amount	Last Contact Date	Next Contact Date	Open Actions
Annual Gift Proposal	Cynthia B. Urban	Nicholas Vincent	$4,000.00	02/12/2002	No Contact Scheduled	1
Annual Research Proposal	Cynthia B. Urban	Nicholas Vincent	$4,000.00	01/02/2002	No Contact Scheduled	
			$8,000.00			

In addition to the information on the Proposal Status panel, you can open a constituent record by clicking the constituent’s name in the results.

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see "Dashboard Action Bars" on page 49.

To view solicitor information, click the solicitor name in the **Solicitor** column of the Proposal Status panel screen. The solicitor's constituent record displays. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the summary results on the Dashboard page, see "View or modify a record from panel results" on page 26.



Any selections you make on the Edit Proposal Status Panel save automatically. These selections do not change unless you edit or delete the Proposal Status from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include	Constituent Name	Constituent Name		To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Classifications to include				Established from the **Tables** link of *Configuration*.
Prospect status to include				Established from the **Tables** link of *Configuration*.
Purposes				Defaults from the **Purpose** field on the Prospect tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Campaigns to include				Select at least one campaign, fund, or solicitor to increase the processing speed.
Funds to include				Select at least one campaign, fund, or solicitor to increase the processing speed.
Solicitors to include	Solicitor	Solicitor		Select at least one campaign, fund, or solicitor to increase the processing speed.
Proposal status to include				Defaults from the **Status** field on the Prospect tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Include inactive proposals				If you mark this checkbox, proposal records with the **Proposal is inactive** checkbox marked are considered for the panel results.
	Proposal			Defaults from the **Name** field on the General tab of the proposal record.
	Ask Amount	Ask Amount		Defaults from the **Amount asked** field on the General tab of the proposal record.
	Expected Amount	Expected Amount		Defaults from the **Amount expected** field on the General tab of the proposal record.
		Days Since Last Contact		Today's date minus Last Contact Date

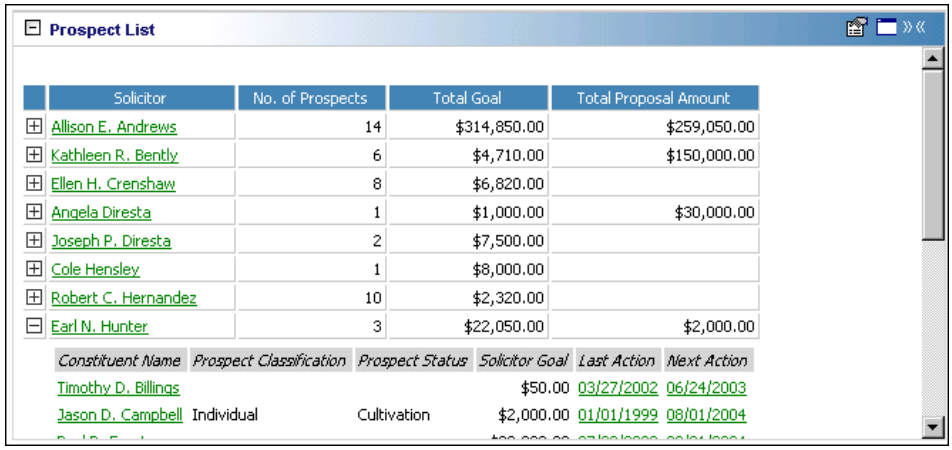
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Last Contact Date	Last Contact Date		Most recent date in the past in the **Action date** field (on a completed action record) that is linked to the proposal record.
	Next Contact Date	Next Contact Date		Closest date in the future to today's date in the **Action date** field (on an action record that is not completed) that is linked to the proposal record.
		Open Actions		Calculates the number of action records not completed.
		Ask Date		Defaults from the **Date asked** field on the General tab of the proposal record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Funded Amount		Defaults from the **Amount funded** field on the General tab of the proposal record.
		Date Funded		Defaults from the **Date funded** field on the General tab of the proposal record.
		Date Expected		Defaults from the **Date expected** field on the General tab of the proposal record.

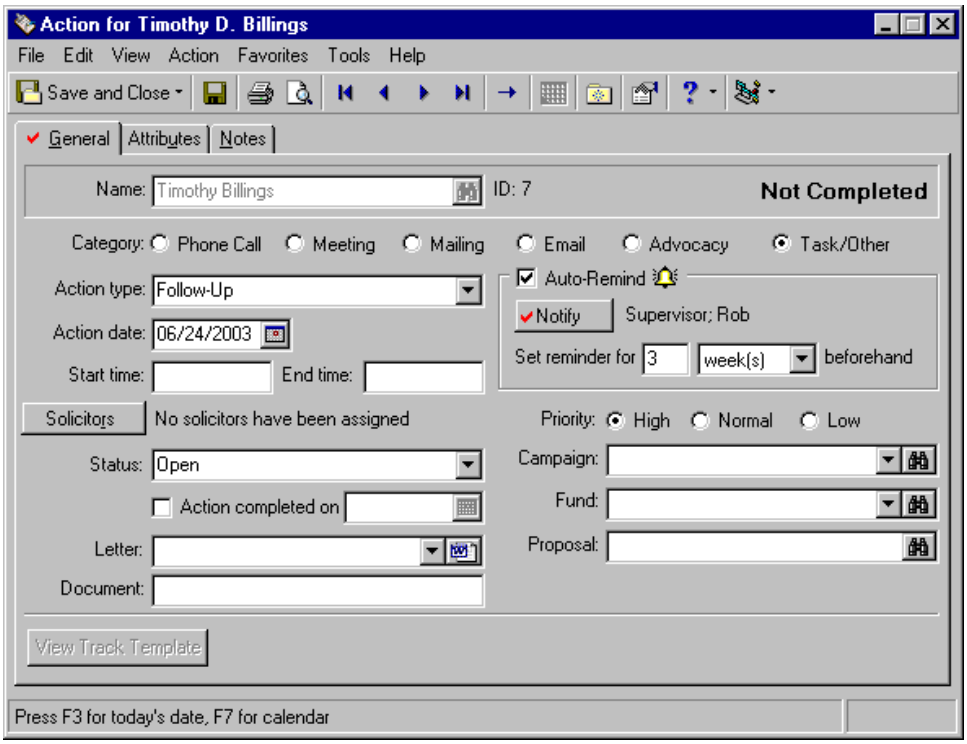
Prospect List

Note: For more information about *Prospect Research Management*, see the *Prospect Data Entry Guide*.

To monitor a list of vital information for your solicitors, such as the number of prospects, total goal amounts, and total proposal amounts, create the Prospect List panel. In addition to monitoring this information on the Dashboard page, you can also view detailed information for the constituents who have assigned solicitors. Click the "+" next to a solicitor's name to view information for the constituents, such as the prospect classification, prospect status, and the last action date and next action date.



If you want to view or make changes to a constituent or action record, click the linked constituent name or action date. The record opens from the Dashboard page.



Any selections you make on the Edit Prospect List Panel save automatically. These selections do not change unless you edit or delete the Prospect List from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the list.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Solicitors to include	Solicitor	Solicitor	Solicitor	To process for a solicitor, select **Selected**. Click the binoculars to search for a solicitor. To process for a group of solicitors, select **Query**. Click the binoculars to search for a query.
Classifications to include	Prospect Classification	Prospect Classification		Established from the **Tables** link of *Configuration*.
Prospect status to include	Proposal Status	Proposal Status		Established from the **Tables** link of *Configuration*.
Purposes				Defaults from the **Purpose** field on the Prospect tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Proposal status to include				Defaults from the **Status** field on the Prospect tab of the constituent record.
	No. of Prospects	No. of Prospects		Calculates the total number of prospects for each solicitor.
	Total Goal	Total Goal		Calculates the total goal amount for each solicitor.
	Total Proposal Amount	Total Proposal Amount		Calculates the total proposal amount for each solicitor.
	Constituent Name	Constituent Name		Defaults from the constituent name fields on the Bio 1 tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Solicitor Goal	Solicitor Goal		Defaults from the **Amount** field on the Assigned Solicitors screen (accessed from the Relationships tab of the constituent record) for each solicitor.
	Last Action	Last Action		Defaults from the **Action date** field on the action record.
	Next Action	Next Action		Defaults from the **Action date** field on the action record.
		Campaign		Defaults from the **Campaign** field on the Assigned Solicitors screen (accessed from the Relationships tab of the constituent record).

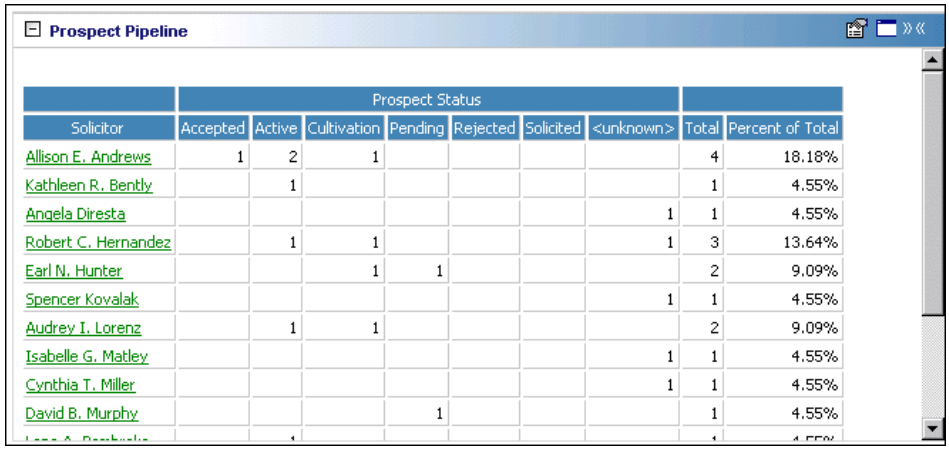
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Fund		Defaults from the **Fund** field on the Assigned Solicitors screen (accessed from the Relationships tab of the constituent record).
		Ask Amount		Defaults from the **Amount asked** field on the General tab of the proposal record.
		Funded Amount		Defaults from the **Amount funded** field on the General tab of the proposal record.
		Proposal		Defaults from the General tab of an action record.

Prospect Pipeline

Note: For more information about *Prospect Research Management*, see the *Prospect Data Entry Guide*.

If you use the optional module *Prospect Research Management*, you can create a Prospect Pipeline to generate a count of each solicitor's prospect or proposal statuses. For each solicitor, a total count of statuses is automatically calculated, as well as the percentage of statuses each solicitor is maintaining.

The list of status columns that display in the panel results depends on the selection you make in the **Status to show** field on the Edit Prospect Pipeline Panel screen. For example, if you select “Prospect Status” a column generates for each type of prospect status (such as Accepted or Cultivation) from the Prospect tab of a constituent record. If you select “Proposal Status”, a column generates for each type of proposal status (such as On hold or Solicitation Visit) from the General tab of a proposal record.



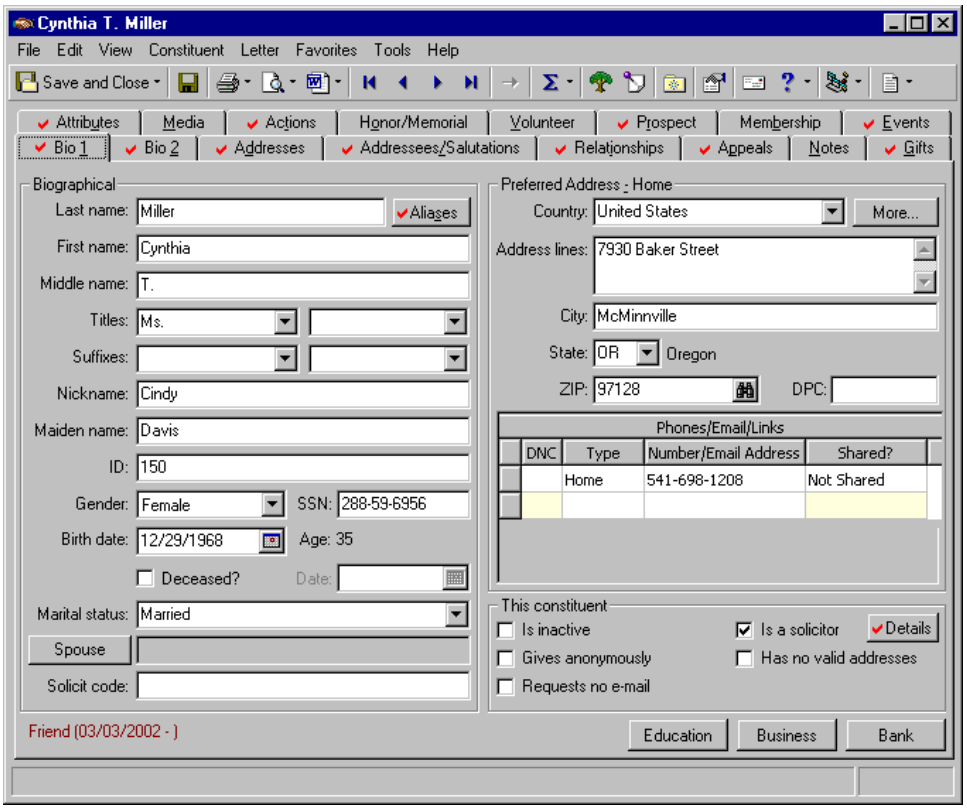
Prospect Pipeline

	Prospect Status								
Solicitor	Accepted	Active	Cultivation	Pending	Rejected	Solicited	<unknown>	Total	Percent of Total
Allison E. Andrews	1	2	1					4	18.18%
Kathleen R. Bently		1						1	4.55%
Angela Diresta							1	1	4.55%
Robert C. Hernandez		1	1				1	3	13.64%
Earl N. Hunter			1	1				2	9.09%
Spencer Kovalak							1	1	4.55%
Audrey I. Lorenz		1	1					2	9.09%
Isabelle G. Matley							1	1	4.55%
Cynthia T. Miller							1	1	4.55%
David B. Murphy				1				1	4.55%

Numbers in the **<unknown>** column indicate the solicitor has a proposal without a status selected in the **Status** field on the record.

Note: If you edit a record from the Dashboard page, you must refresh the Dashboard panel results to include your edits. To do this, click **Panel options** on the Dashboard panel action bar. A drop-down menu appears. From the drop-down menu, select **Refresh**. For more information about the Dashboard panel action bar, see “Dashboard Action Bars” on page 49.

To open a solicitor's constituent record, click the solicitor name in the **Solicitor** column of the panel. After the record opens, you can view or change information in the record. For more information about viewing and modifying records from the summary results on the Dashboard page, see "View or modify a record from panel results" on page 26.



Any selections you make on the Edit Prospect Pipeline Panel save automatically. These selections do not change unless you edit or delete the Prospect Pipeline from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Solicitors to include	Solicitor			To process for a solicitor, select **Selected**. Click the binoculars to search for a solicitor. To process for a group of solicitors, select **Query**. Click the binoculars to search for a query.
Prospects to include				The Open Query screen appears so you can select a query of prospects to process.
Classification s to include				Established from the **Tables** link of *Configuratio n*.
Campaigns to include				Select at least one campaign, fund, or solicitor to increase the processing speed.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Funds to include				Select at least one campaign, fund, or solicitor to increase the processing speed.
Status to show				Options include: Prospect Status and Proposal Status.
Prospect status to include	Prospect Status	Prospect Status — if you select "Prospect Status" in the **Status to show** field, columns for each type of prospect status display in the panel results.		Established from the **Tables** link of *Configuratio n*.
Proposal status to include	Proposal Status	Proposal Status — if you select "Proposal Status" in the **Status to show** field, columns for each type of proposal status display in the panel results.		Defaults from the **Status** field on the General tab of the proposal record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Include inactive proposals				If you mark this checkbox, proposal records with the **Proposal is inactive** checkbox marked are considered for the panel results.
Funded proposals only				If you mark this checkbox, proposals with an amount in the **Amount funded** field on the proposal record are included in the panel results.

Volunteer

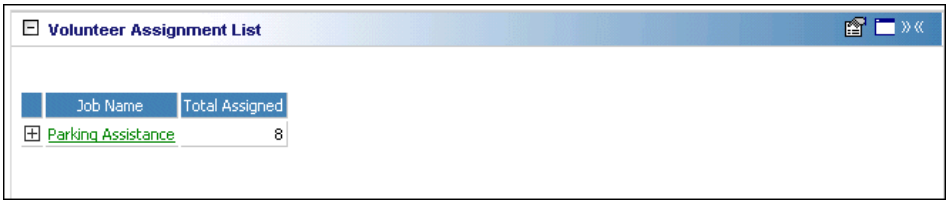
Use the following volunteer Dashboard panel to analyze and monitor your volunteers' progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Volunteer Assignment List

Note: For more information about *Volunteer Management*, see the *Volunteers & Jobs Data Entry Guide*.

If you use the optional module *Volunteer Management*, you can create a Volunteer Assignment List to view your volunteers' job assignments. The list includes information for specific jobs and jobs in the current or last week, month, quarter, calendar year, or fiscal year. Of these assignments, you can view information such as the volunteer name, start and end date, start and end time, location, and category.

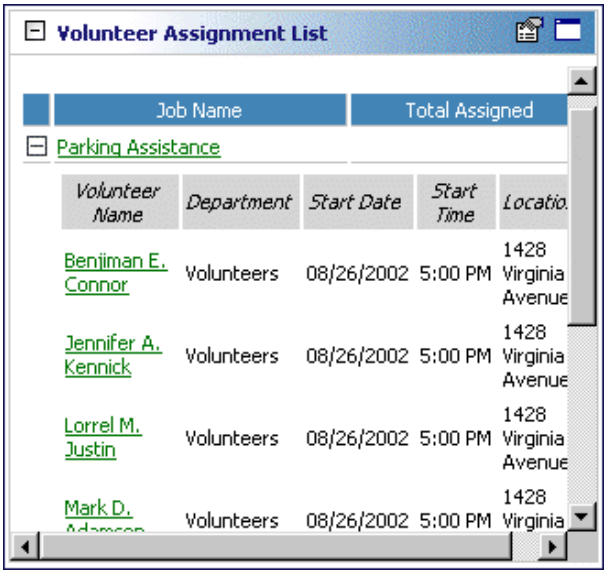
For example, you are planning your annual golf tournament. You need to make sure you have the correct number of volunteers assigned for parking assistance. You can create a Volunteer Assignment List to check the time, location, and total number of volunteers for the parking assistance job. To do this, select "Parking Assistance" in the **Jobs** row and select "Location" in the **Columns to show** row, along with the other column defaults. For information about creating a panel, see "Create a new Dashboard panel" on page 12.



If you use the optional module *Volunteer Management*, *Dashboard* is a great resource for you to analyze and compare volunteer and job data. The Volunteer Assignment List displays a list of jobs and volunteers for each job. The Job List calculates your number of jobs and also displays a list of jobs. The Volunteer Hours panel calculates the amount of volunteer hours per job, and also calculates a total number of volunteer hours. Displaying this information on the Dashboard page helps you easily recognize the strengths and weaknesses of your volunteer system. You can take advantage of this to continue what is working well for your organization and focus on the areas you feel need improvement.

Tip: To send an email to a constituent directly from the Dashboard page, click the email address in the panel results (if you have "email" selected in the **Columns to show** row). If you use MAPI compliant email software (such as *Microsoft Outlook*), your email screen appears.

To view the **Volunteer Name**, **Department**, **Start Date**, **End Date**, **Start Time**, **End Time**, **Location**, **Category**, **Position**, **Phone**, and **Email** information on the Volunteer Assignment List panel results, click the square to the left of the job name.



You can open a job record by clicking the job name in the panel results on the Dashboard page. A volunteer's constituent record opens when you click the volunteer's name in the panel results, as well. To view the volunteer's name, click the square next to the job name. Once the list expands, click the volunteer name to view the constituent record.

Any selections you make on the Edit Volunteer Assignment List Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Volunteers to include				The Open Query screen appears so you can select a query of volunteers to process.
Jobs to include	Job Name			To process for specific jobs, select **Selected**. Move jobs to the **Include these Jobs** box for processing. To process for a group of jobs, select **Query**. Click the binoculars to search for a query.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Total Assigned			Calculates the total number of volunteers assigned per job.
	Volunteer Name		Volunteer Name	Defaults from the Volunteer tab on the job record.
	Department	Department		Defaults from the Volunteer tab on the constituent record.
	Start Date	Start Date		Defaults from the Volunteer tab on the constituent record.
		End Date		Defaults from the Volunteer tab on the constituent record.
	Start Time	Start Time		Defaults from the Volunteer tab on the constituent record.
		End Time		Defaults from the Volunteer tab on the constituent record.

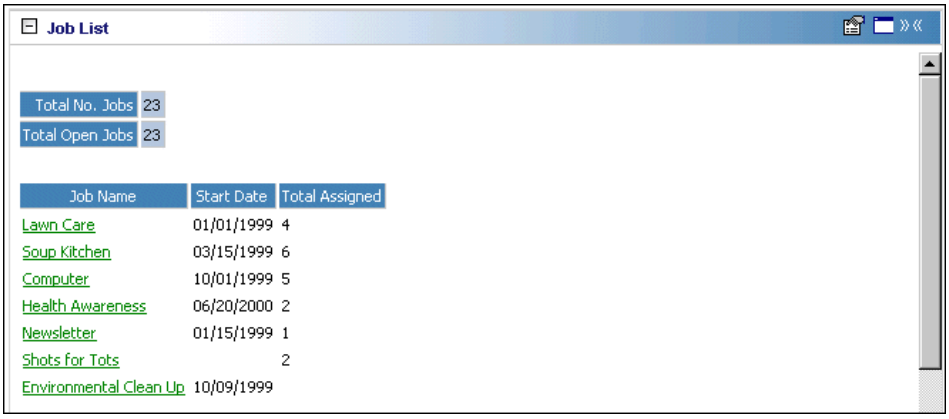
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Location		Defaults from the Volunteer tab on the constituent record.
		Category		Defaults from the Volunteer tab on the constituent record.
		Position		Defaults from the Volunteer tab on the constituent record.
		Phone		Defaults the volunteer's phone information from the Bio 1 tab in the constituent record.
		Email		Defaults the volunteer's email information from the Bio 1 tab in the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		DNC		If the phone is marked "Do Not Contact" on the constituent record, the Do Not Contact warning appears in the column.

Job List

Note: For more information about *Volunteer Management*, see the *Volunteers & Jobs Data Entry Guide*.

Twice a year your organization hosts a Volunteer Fair. You want to quickly view all the jobs available at your organization. If you use the optional module *Volunteer Management*, you can process a Job List panel to quickly see all jobs, how many people are assigned to each job, and where you need more volunteers. By creating this panel, you can decide for which jobs you need to recruit volunteers.



If you use the optional module *Volunteer Management*, *Dashboard* is a great resource for you to analyze and compare volunteer and job data. The Job List calculates your number of jobs and also displays a list of jobs. The Volunteer Assignment List displays a list of jobs and volunteers for each job. The Volunteer Hours panel calculates the amount of volunteer hours per job, and also calculates a total number of volunteer hours. Displaying this information on the Dashboard page helps you easily recognize the strengths and weaknesses of your volunteer system. You can take advantage of this to continue what is working well for your organization and focus on the areas you feel need improvement.

Tip: You can open a job record by clicking the job name in the panel results on the Dashboard page.

You can select to view the number of jobs, the number of open jobs, the job name, job start date, and the number of volunteers assigned to each job on the Job List panel, among other job-related information. You can also filter your results by selecting a date range, selecting to process completed jobs or uncompleted jobs (or both), or a specific organization or event.

The main Job List panel includes the total number of jobs, the total number of open jobs, and the job name.

Any selections you make on the Edit Job List Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
Job completed	Job Name	Job Name	Job Name	Options include: Completed, Uncompleted, and Completed and Uncompleted
Specific events/orgs		Event/Org. Name		Options include: Organization and Event
Organizations to include				Filters using the **Org Name** field on the constituent record.

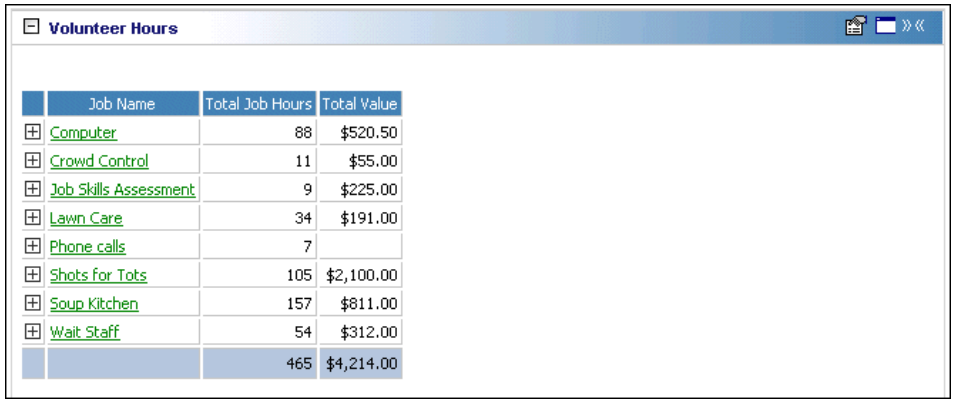
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Events to include				Filters using the **Name** field on the General tab of the Event record.
	Total No. Jobs	Total No. Jobs		Total number of jobs included in the panel results.
	Total Open Jobs	Total Open Jobs		Total number of open jobs included in the panel results.
	Start Date	Start Date		Defaults from the Job Assignment screen on the Volunteer tab of the constituent record.
	Total Assigned	Total Assigned		Calculates the total number of volunteers assigned per job.
		Category		Defaults from the Job Assignment screen on the Volunteer tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		End Date		Defaults from the Job Assignment screen on the Volunteer tab of the constituent record.
		Completed?		Panel results are “Yes” or “No”. Defaults from the General tab of the job record.

Volunteer Hours

Note: For more information about *Volunteer Management*, see the *Volunteers & Jobs Data Entry Guide*.

Tracking volunteer hours is important to your organization for a number of reasons. For example, volunteers may be required to complete a certain number of service hours to receive volunteer recognition awards. Your annual Volunteer Appreciation Dinner is coming up. If you use the optional module *Volunteer Management*, you can create a Volunteer Hours panel to monitor volunteer hours and know who will receive a recognition award at the dinner. The Volunteer Hours panel processes information based on the data you enter on the Time Sheet screen from the Volunteer tab of a volunteer’s constituent record.



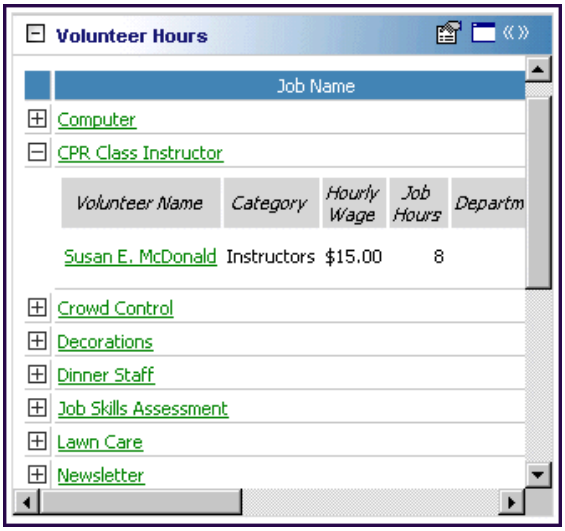
Volunteer Hours

Job Name	Total Job Hours	Total Value
Computer	88	$520.50
Crowd Control	11	$55.00
Job Skills Assessment	9	$225.00
Lawn Care	34	$191.00
Phone calls	7	
Shots for Tots	105	$2,100.00
Soup Kitchen	157	$811.00
Wait Staff	54	$312.00
	465	$4,214.00

If you use the optional module *Volunteer Management*, *Dashboard* is a great resource for you to analyze and compare volunteer and job data. The Volunteer Hours panel calculates the amount of volunteer hours per job, and also calculates a total number of volunteer hours. The Volunteer Assignment List displays a list of jobs and volunteers for each job. The Job List calculates your number of jobs and also displays a list of jobs. Displaying this information on the Dashboard page helps you easily recognize the strengths and weaknesses of your volunteer system. You can take advantage of this to continue what is working well for your organization and focus on the areas you feel need improvement.

You can select to include the job name, volunteer name, number of job hours, job date, and the event and organization name, among other volunteer hour-related data on the Volunteer Hours panel. You can also filter your results by selecting a date range or a specific organization or event.

To view the **Volunteer Name**, **Category**, **Hourly Wage**, **Job Hours**, **Department**, **Location**, **Volunteer Type**, **Task**, **Position**, **Job Date**, and **Event/Org. Name**, click the square to the left of the job name.



You can open a job record by clicking the job name in the panel results on the Dashboard page. A volunteer's constituent record opens when you click the volunteer's name in the panel results, as well.

Any selections you make on the Edit Volunteer Hours Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
Volunteers to include				The Open Query screen appears so you can select a query of volunteers to process.
Specific events/orgs		Event/Org. Name		Options include: Organization and Event
Organizations to include				Filters using the **Org Name** field on the Org 1 tab of the constituent record.
Events to include				Filters using the **Name** field on the Org 1 tab of the event record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Job Name		Job Name	Defaults from the **Job** field on the General tab of the job record.
	Total Job Hours	Total Job Hours		Calculates the total amount of job hours per job.
	Total Value	Total Value		Calculates the total value amount for volunteers per job.
	Volunteer Name	Volunteer Name		Defaults from the Volunteers tab on the job record.
	Category	Category		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.
	Job Date	Job Date		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Job Hours	Job Hours		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.
		Hourly Wage		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.
		Department		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.
		Location		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Volunteer Type		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.
		Task		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.
		Position		Defaults from the Time Sheet screen, accessed from the Volunteer tab of the constituent record.

Action

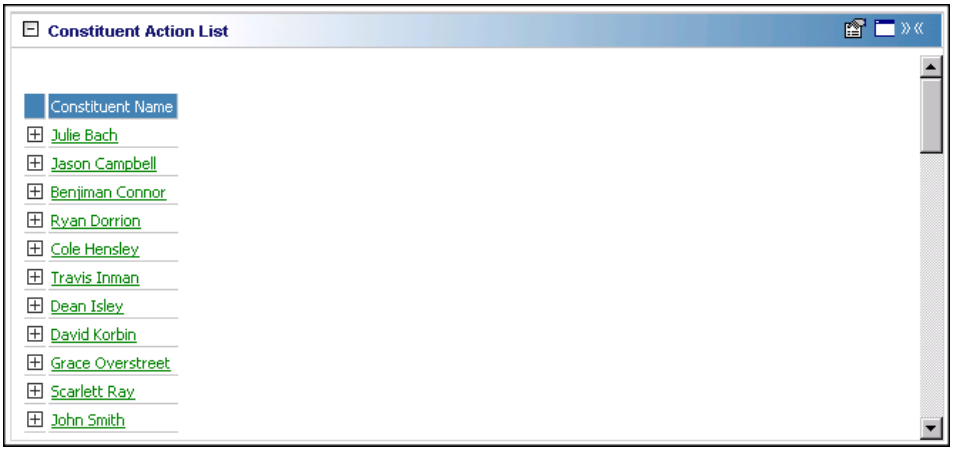
Use the following action Dashboard panels to analyze and monitor your actions' progress. You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard on the Dashboard page action bar.

Constituent Action List

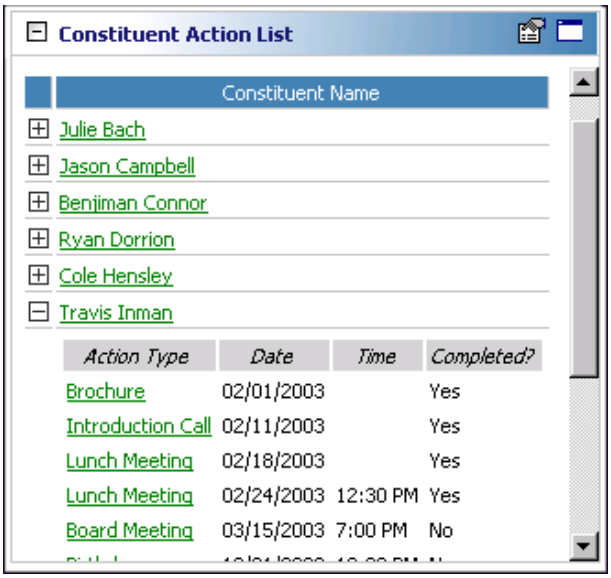
To easily view information for constituent actions, create the Constituent Action List. You can filter this action information on action types, dates, constituent codes, solicitors, and open action items. This list provides detail information for your constituent actions such as the number of action, time, and location.

Tip: To send an email to a constituent directly from the Dashboard page, click on the email address in the panel results (if you have "Email" selected in the **Columns to show** row). If you use MAPI compliant email software (such as *Microsoft Outlook*), your email screen appears.

You can create the Constituent Action List to obtain a history of actions for a group of your constituents. For example, you need a list of actions so far this year that have taken place to help secure donations from your constituents with the constituency code of Major Donors. You can create this by selecting the Major Donor constituent code and the columns you want to show on the Edit Constituent Action List Panel. Once the Constituent Action List completes processing, the panel results display on the Dashboard page. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.



To view the Action Type, Date, Time, and Completed? information on the Constituent Action List panel results, click the square to the left of the constituent name.



Other Constituent Action List information not shown in this example, but can be viewed from the expanded list is: Time, Location/Phone, Letter, Users to Notify, and Proposal (if you use the optional module *Prospect Research Management*). With *Blackbaud NetAdvocacy*, you can process information for No. Alerts, Category, Issue, Delivery Method, Recipient Name, and Message ID. For more information about *Blackbaud NetAdvocacy*, see the Actions chapter of the Constituent Data Entry Guide.

You can open a constituent record by clicking the constituent name in the panel results on the Dashboard page. You can also open an action record when you click the action in the **Action Type** column in the panel results. To view the action record, click the square next to the constituent name. Once the list expands, click the action to view the action record.

Any selections you make on the Edit Constituent Action List Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Actions to include				The Open Query screen appears so you can select a query of actions to process.
Action Type	Action Type	Action Type		Filters using the **Action type** field on the General tab of an action record.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Constituencies to include				Comes from the Bio 2 tab on the constituent record.
Assigned to	Assigned to	Assigned to		To process for a solicitor, select **Selected**. Click the binoculars to search for a solicitor. To process for a group of solicitors, select **Query**. Click the binoculars to search for a query.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Only list open Actions	Open Actions	Open Actions		Mark this option if you want the panel results to consider only Open actions. This helps increase processing speed.
Action Category				Comes from the General tab on the action record.
	Constituent Name		Constituent Name	Matching Gifts display with the organization name first, followed by the individual's name responsible for the gift in parentheses.
	No. Actions	No. Actions		Calculates total number of actions per constituent.
		Email		Defaults the constituent's email information from the Bio 1 tab in the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Phone		Defaults the constituent's email information from the Bio 1 tab in the constituent record.
	Date	Date	Date	Defaults from the General tab of an action record.
	Time	Time		Defaults from the General tab of an action record.
	Completed?	Completed?		Defaults from the General tab of an action record.
	Location/ Phone/Letter	Location/ Phone/Letter		Defaults from the General tab of an action record.
		Users to Notify		Comes from the **Notify** button on the General tab of an action record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Proposal (only if you use the optional module *Prospect Research Managemen t*)		Defaults from the General tab of an action record.
		No. Alerts (only if you use the optional module *Blackbaud NetAdvocacy*)		Calculates the number of Advocacy actions per constituent.
		Category (only if you use the optional module *Blackbaud NetAdvocacy*)		Defaults from the General tab of an action record.
		Issue (only if you use the optional module *Blackbaud NetAdvocacy*)		Defaults from the General tab of an action record.
		Delivery Method (only if you use the optional module *Blackbaud NetAdvocacy*)		Defaults from the General tab of an action record.

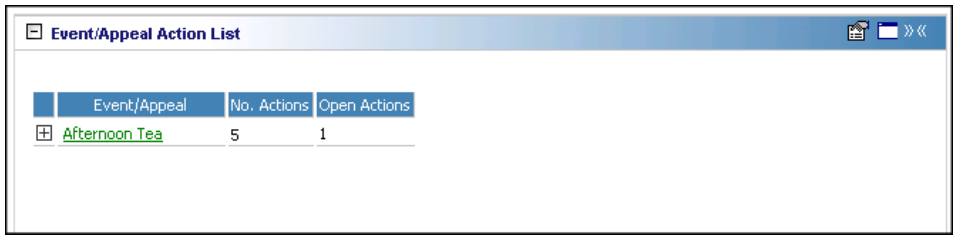
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Recipient Name (only if you use the optional module *Blackbaud NetAdvocacy*)		Defaults from the General tab of an action record.
		Message ID (only if you use the optional module *Blackbaud NetAdvocacy*)		Defaults from the General tab of an action record.
		DNC		If the phone is marked “Do Not Contact” on the constituent record, the Do Not Contact warning appears in the column.

Event/Appeal Action List

Note: For more information about *Event Management*, see the *Event Management Data Entry Guide*. If you do not use the optional module *Event Management*, this panel is called the Appeal Action List and only applies to appeal actions.

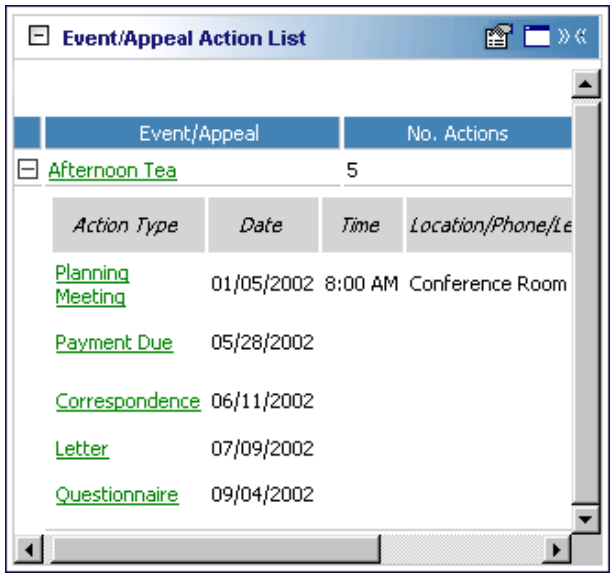
You can create an Event/Appeal Action List to quickly view actions relevant to an event or appeal — from sending invitations for a golf tournament to sending a copy of your data to a mailing house for an appeal. Determine your results for an Event/Appeal Action List by selecting to process open actions only, specific action types, and action dates. You can view these results for every Event/Appeal Action List you create, along with other information, such as the solicitor to whom the action is assigned and the time the action took place.

You can create an Event/Appeal Action List to organize and monitor actions when you are preparing your organization for an upcoming event or preparing to send out an appeal. For example, an Afternoon Tea is going to be held in a month to honor your trustees. You have added several event actions for this event to the Afternoon Tea event record. These include a planning meeting, a correspondence letter to the invitees, and a questionnaire to receive the invitees' feedback once the tea is over. Create the Event/Appeal Action List to continuously display on the Dashboard page to monitor the status and progress of the event actions as they come due. To do this, select the event and the date range on the Edit Event/Appeal Action List Panel. The status information automatically defaults, letting you know the number of actions that exist and how many remain Open. For information about creating a panel, see "Create a new Dashboard panel" on page 12.

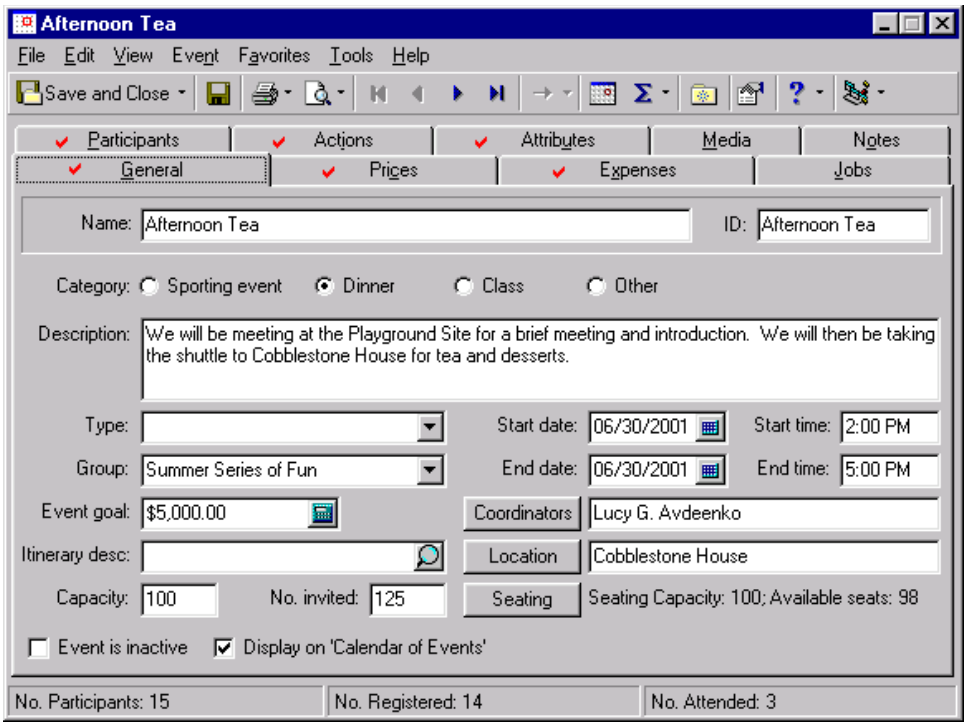


Tip: You can open an event record by clicking the event name in the panel results on the Dashboard page.

To view the Action Type, Date, Time, Location/Phone/Letter, Completed?, Assigned to, and Users to Notify information on the Event/Appeal Action List panel results, click the square to the left of the event name.



You can open an event or appeal record by clicking the event or appeal name in the panel results on the Dashboard page. You can also open an action record by clicking the action in the **Action Type** column in the panel results. To view the action record, click the square next to the event or appeal name. Once the list expands, click the action to view the action record.



Any selections you make on the Edit Event/Appeal Action List Panel save automatically. These selections do not change unless you edit or delete the Event/Appeal Actions List from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Specific events/appeals	Event/Appeal			Options include: Event and Appeal, Events only, or Appeals only

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Events to include	Event		Event	To increase the processing speed, select at least one event or appeal.
Appeals to include				To increase the processing speed, select at least one event or appeal.
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr
Actions to include				The Open Query screen appears so you can select a query of actions to process.
Action Type	Action Type	Action Type		Defaults from the General tab within the Actions tab of the event record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Assigned to	Assigned to	Assigned to		To process for a solicitor, select **Selected**. Click the binoculars to search for a solicitor. To process for a group of solicitors, select **Query**. Click the binoculars to search for a query.
Only list open actions	Open Actions	Open Actions		Mark this option if you want the panel results to only consider Open actions. This helps increase processing speed.
	No. Actions			Calculates the total number of actions per event.
	Time	Time		Comes from the General tab within the Actions tab of the event record.

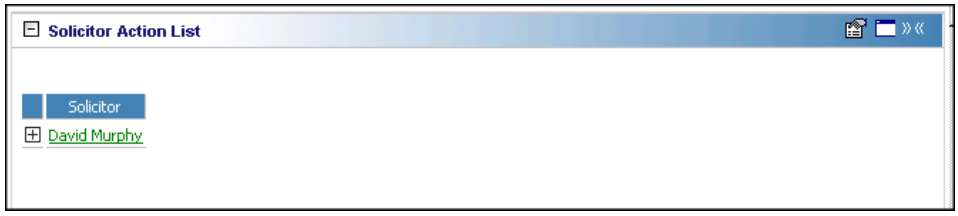
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Date	Date		Comes from the General tab within the Actions tab of the event record.
	Completed?	Completed?		Comes from the General tab within the Actions tab of the event record.
		Users to Notify		Comes from the **Notify** button on the General tab within the Actions tab of the event record.
	Location/ Phone/Letter	Location/ Phone/Letter		Comes from the General tab within the Actions tab of the event record.

Solicitor Action List

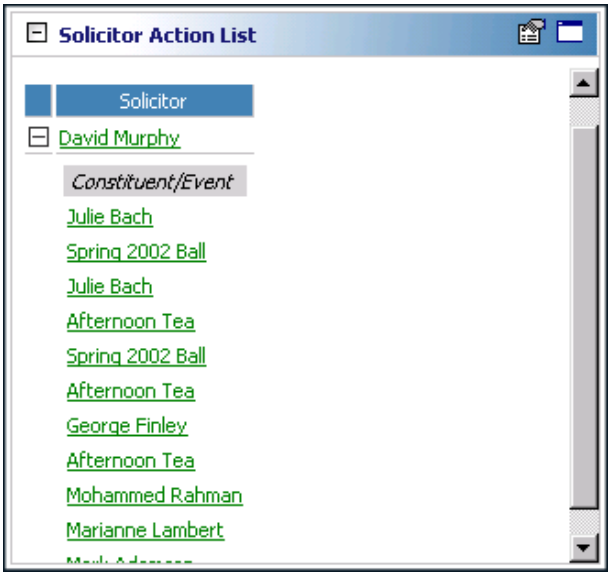
No one is in contact more with your constituents than your solicitors. For them to obtain goal expectations, it is important they maintain a busy, active schedule. You can monitor the course of action with the Solicitor Action List by viewing detail information, such as the solicitor name, category, status, location, constituent phone, and email address.

Tip: To send an email to a constituent directly from the Dashboard page, click directly on the email address in the panel results (if you have "Email" selected in the **Columns to show** row). If you use MAPI compliant email software (such as *Microsoft Outlook*), your email screen appears.

You can create a Solicitor Action List to view a solicitor's action history. For example, David Murphy, a solicitor for your organization, needs a list of names of the constituents he contacted in the last month. To print a list of the names, select the solicitor's name, the date range, and Constituent/Event in **Columns to Show**. The solicitor's name automatically defaults, and you cannot remove the information from the panel results. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.



Once the Solicitor Action List displays on the Dashboard page, click the square next to David's name in the panel results to view the list of constituents he solicited this month.



Other Solicitor Action List information not shown in this example, but can be viewed from the expanded list is: **Action Type**, **Date**, **Time**, **Location/Phone**, **Letter**, **Completed?**, **Users to Notify**, **Constituent/Event names** (if you use the optional module *Event Management*), constituent **Phone**, and constituent **Email**.

For more information about creating Dashboard panels, see "Create a new Dashboard panel" on page 12. For more information about printing this list for a solicitor, see "Print a panel" on page 34.

Any selections you make on the Edit Solicitor Action List Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Assigned to	Solicitor		Solicitor	To process for a solicitor, select **Selected**. Click the binoculars to search for a solicitor. To process for a group of solicitors, select **Query**. Click the binoculars to search for a query.
Action Type	Action Type	Action Type		Filters using the **Action type** field General tab of an action record.
Date range			Action date	List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, or Last fiscal yr

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Only list open Actions				Mark this option if you want the panel results to consider only Open actions. This helps increase processing speed.
	Solicitor			Defaults name information from the Bio 1 tab in the constituent record.
	No. Actions	No. Actions		Calculates total number of actions per solicitor.
		Solicitor Phone		Defaults phone information from the Bio 1 tab in the constituent record.
		Solicitor Email		Defaults email information from the Bio 1 tab in the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Date	Date		Defaults from the General tab of the action record.
	Time	Time		Defaults from the General tab of the action record.
	Completed?	Completed?		Defaults from the General tab of the action record.
	Constituent/ Event (Event appears only if you use the optional module *Event Managemen t*)	Constituent/ Event (Event appears only if you use the optional module *Event Managemen t*)		Defaults from the General tab of the action record.
		Phone		Defaults the constituent's phone information from the Bio 1 tab in the constituent record.
		Email		Defaults the constituent's email information from the Bio 1 tab in the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Location/ Phone/Letter	Location/ Phone/Letter		Defaults from the General tab of the Action record.
		Users to Notify		Comes from the **Notify** button on the General tab of an action record.
		DNC		If the phone is marked "Do Not Contact" on the constituent record, the Do Not Contact warning appears in the column.

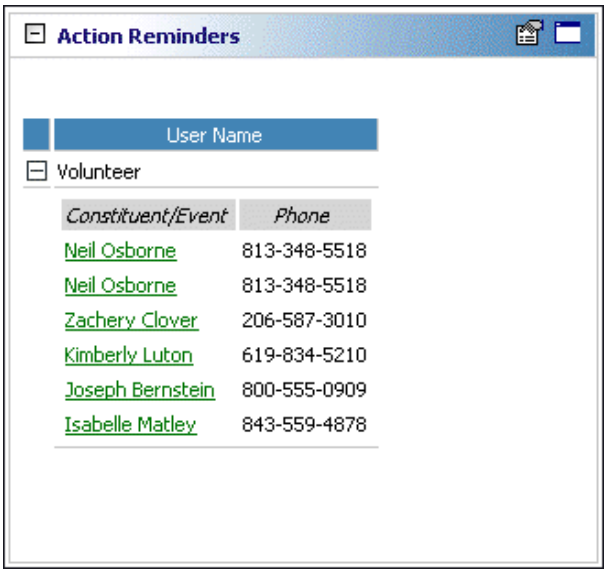
Action Reminders

Nothing could be more useful for your personal daily activities than the Action Reminders panel. Use this list to schedule your upcoming agenda or to view a co-worker's agenda for the current or last week, month, quarter, calendar year, or fiscal year.

Tip: To send an email to a constituent directly from the Dashboard page, click directly on the email address in the panel results (if you have "Email" selected in the **Columns to show** row). If you use MAPI compliant email software (such as *Microsoft Outlook*), your email screen appears.

Action Reminders panel contains valuable action information. For example, your organization recently received six $1000 gifts from six alumni. You want to call each of these alumni to personally thank them for the donation. You can obtain the phone numbers you need from the Action Reminder panel results. For more information about creating a panel, see "Create a new Dashboard panel" on page 12.

Once the Action Reminders panel display on the Dashboard page, click the square next to the user's name in the panel results to view the list of constituents and the phone numbers you need to place your calls.



Other Action Reminders panel information not shown in this example, but can be viewed from the expanded list is: Date, Time, Category, Action Type, constituent email, and Location/Phone/Letter.

Any selections you make on the Edit Action Reminders Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see "Open and edit a panel" on page 20. For information about deleting a panel, see "Delete a panel" on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Users	User Name		User Name	If you only display the current user's action reminders, User Name does not default in the panel results.
Actions to include				The Open Query screen appears so you can select a query of actions to process.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Sort by				Options include: Date, Category, and Action Type
Sort order				Options include: Ascending and Descending
	No. Actions	No. Actions		Calculates the total number of actions per user.
	Date	Date	Date	Defaults from the General tab of the Action record.
		Time		Defaults from the General tab of the Action record.
	Category	Category		Defaults from the General tab of the Action record.
	Action Type	Action Type		Defaults from the General tab of the Action record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Constituent/ Event (Event appears only if you use the optional module *Event Managemen t*)	Constituent/ Event (Event appears only if you use the optional module *Event Managemen t*)		Defaults from the General tab of the Action record.
	Location/ Phone/Letter	Location/ Phone/Letter		Defaults from the General tab of the Action record.
		Phone		Defaults the constituent's phone information from the Bio 1 tab in the constituent record.
		Email		Defaults the constituent's email information from the Bio 1 tab in the constituent record.
		Proposal (when you use *Prospect Research Managemen t*)		Defaults from the General tab of the Action record.

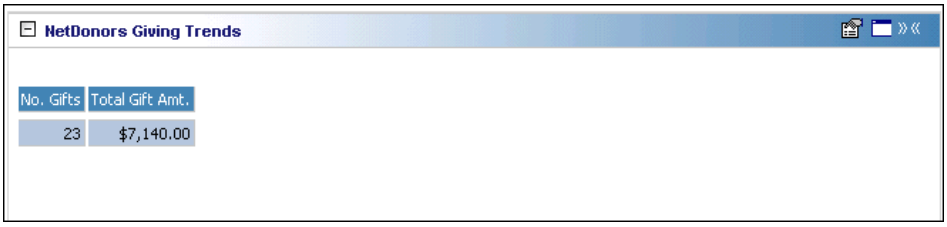
Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Solicitor		Defaults from the General tab of the Action record.
		DNC		If the phone is marked “Do Not Contact” on the constituent record, the Do Not Contact warning appears in the column.

NetSolutions

If you use the optional module *NetSolutions for Online Fundraising & Communication*, you can use the NetDonors Giving Trends panel to analyze and monitor your online progress. You can display up to 255 panels on each Dashboard page and create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser’s Edge 7*** when you click **Dashboard** on the Raiser’s Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard in the **Dashboard** field on the Dashboard page action bar.

NetDonors Giving Trends

The NetDonors Giving Trends panel is an efficient analysis of your online giving trends. With the click of a few buttons, you can quickly calculate and display the number of gifts and the total gift amount for online transactions. You can filter your information on dates, amounts, campaigns, funds, or appeals. You can also select to break the information down by month, campaign, fund, or appeal.



Any selections you make on the Edit NetDonors Giving Trends Panel save automatically. These selections do not change unless you edit or delete the list from the Customize Dashboard panel. For information about editing a panel, see “Open and edit a panel” on page 20. For information about deleting a panel, see “Delete a panel” on page 39.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Date range				List includes: This week, Last week, This month, Last month, This quarter, Last quarter, This calendar yr, Last calendar yr, This fiscal yr, Last fiscal yr, or Include all dates
Breakdown by				Options include: Month, Campaign, Fund, and Appeal
Output				Options include: Table, Graph, or Table and Graph
Do not show gifts less than				For example, if you want only to include gifts in the amount of $100 or higher, enter $100.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Gifts to include				The Open Query screen appears so you can select a query of gifts to process.
Constituents to include				To process for a constituent, select **Selected**. Click the binoculars to search for a constituent. To process for a group of constituents, select **Query**. Click the binoculars to search for a query.
Campaigns to include				To increase the processing speed, select at least one campaign, fund, or appeal.
Funds to include				To increase the processing speed, select at least one campaign, fund, or appeal.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Appeals to include				To increase the processing speed, select at least one campaign, fund, or appeal.
	No. Gifts			Calculates the total number of gifts for the panel results.
	Total Gift Amt.			Calculates the total gift amount for the panel results.

Patron Edge

If you have ***The Patron Edge***, you can use the Patron Contact List panel to analyze integrated data between ***The Raiser's Edge*** and ***The Patron Edge***. You can display up to 255 panels on each Dashboard page and create an unlimited amount of these pages in *Dashboard*. They display on the shell of ***The Raiser's Edge 7*** when you click **Dashboard** on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. Choose this page by selecting a Dashboard in the **Dashboard** field on the Dashboard page action bar.

Patron Contact List

To view donors who plan to attend an upcoming event (subscribers or single ticket holders), generate the Patron Contact List panel. You can also generate the panel to monitor attendance for cultivation purposes.

For example, you need to inform your solicitors of the major donor prospects who will be attending an upcoming event. You can email the Patron Contact List panel to the solicitors individually or to a group.

Patron Contact List

Constituent Name	Event Name	Last Gift Date	Last Gift Type	Last Gift Amount	Last Action Date	Last Action Type	Last Action Completed?	Total Amount	Solicitor
Mark Adamson	Brad Heiser Case Study Presentation (01/12/2005, 3:30 PM)	10/19/2005	Cash	$250.00				$800.00	Allison Andrews
Mark Adamson	Hello Dali - the Life and Times of Salvadore Dali (08/01/2005, 9:00 PM)	10/19/2005	Cash	$250.00				$800.00	Allison Andrews
Mark Adamson	Nutcracker (12/11/2005, 2:30 PM)	10/19/2005	Cash	$250.00				$800.00	Allison Andrews
Mark Adamson	Raising the Titanic (09/01/2005, 1:00 PM)	10/19/2005	Cash	$250.00				$800.00	Allison Andrews
Mark Adamson	Swan Lake (10/02/2005, 2:30 PM)	10/19/2005	Cash	$250.00				$800.00	Allison Andrews
Franklin Andrews	Science Museum Admission (09/01/2005, 10:00 AM)								
Elizabeth Ashton	As You Like It (11/04/2005, 8:00 PM)	10/19/2005	Cash	$50.00				$150.00	
Elizabeth Ashton	Christmas Carol (12/16/2005, 8:00 PM)	10/19/2005	Cash	$50.00				$150.00	

In addition, you can monitor the panel to see if any major donors made a recent visit to your museum. If so, you can make calls to see if they enjoyed the new exhibit on display.

The Patron Contact List can be broken down by event, solicitor, or constituent. To display a ***Patron Edge*** client name on the panel successfully, the client must be integrated with a ***Raiser's Edge*** constituent record. For more information, see *The Patron Edge and The Raiser's Edge Integration Guide*.

Information in the following chart contains filters, column defaults, column options, sort defaults, and other specific information you need to know. To use *Dashboard* efficiently, you should become familiar with all information in the chart before you create the summary.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Show names to include				Panel is processed based on the show from ***The Patron Edge***. You can select more than one show name.
Show types to include				Options include the table entries defined in the **Show Type** table in ***The Patron Edge***. You can select more than one type.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Event date range				List includes: Today, Tomorrow, Yesterday, This week, Last week, This month, Last month, This quarter, or Last quarter.
Breakdown by				Options include: Event, Solicitor, Constituent
Constituencies to include				This field is used only for filtering purposes. Data does not appear on the panel as a result of the field.
Solicitors types to include				This field is used only for filtering purposes. Data does not appear on the panel as a result of the field.
Gift types to include				Pledges: the amount in the summary is the Master Pledge amount.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
Include soft credit amounts in total amount				If you mark this checkbox, calculations include soft credits. However, no way exists to identify the soft credit gifts on the panel.
Do not include constituents with total amount less than				Limits the constituents that appear on the panel based on a minimum total gift amount.
	Constituent Name		Constituent (if selected in the **Breakdown by** field)	Name of the constituent in ***The Raiser's Edge***.
	Event Name			The event name from ***The Patron Edge*** appears.
		Seating		Includes row and seat information.
		No. of Tickets		Equals the number of tickets purchased.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
	Total Amount	Total Amount		Calculates the total amount based on gift type filters and date range.
	Last Gift Date	Last Gift Date		Displays the gift date of the most recent gift donated.
	Last Gift Type	Last Gift Type		Displays the gift type of the most recent gift.
	Last Gift Amount	Last Gift Amount		Displays the gift amount of the most recent gift donated.
	Last Gift Fund	Last Gift Fund		Displays the fund for which the most recent gift was donated.
	Last Action Date	Last Action Date		Date of the most recent action for a constituent.
	Last Action Type	Last Action Type		Displays the action type for the most recent action.
		Last Action Completed?		Displays Yes or No.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		Constituent Phone		Displays the first phone number (based on phone type) from the constituent's preferred address.
		Constituent Email		Displays the email address (based on phone type) from the constituent's preferred address.
	Solicitor	Solicitor		Includes the name of the solicitor assigned to the constituent.
		Solicitor Email		Displays the solicitor's email address (based on phone type) from the solicitor's preferred address.
		Constituent Code		Comes from the Bio 2 tab of the constituent record.

Filter	Default Columns to Show	Optional Columns to Show	Default Sort	Notes
		DNC		If the phone is marked "Do Not Contact" on the constituent record, the Do Not Contact warning appears in the column.

Giving Score

If your data has been scored by *Target Analytics* for the Giving Score, you can use the following Giving Score dashboard panels to view and analyze Giving Score ratings assigned to your constituents. You can also use these panels to access Giving Score queries that have been created.

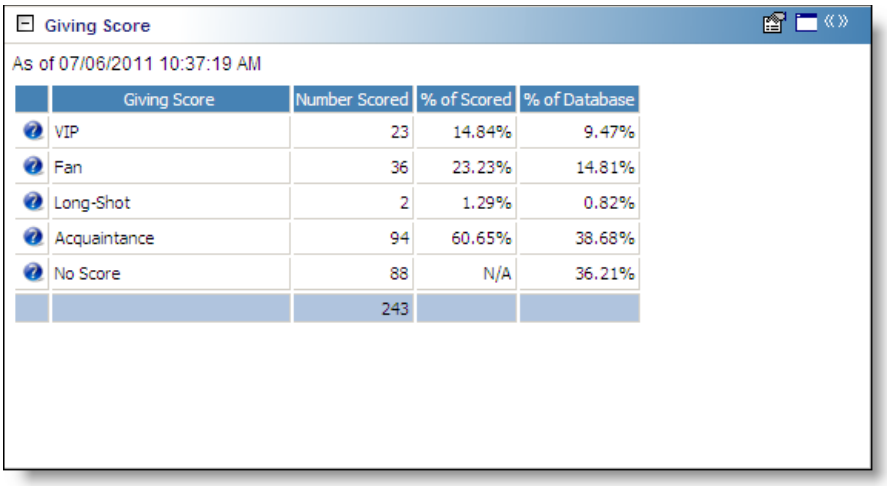
Note: You submit your data through the **Data Health Center** to be scored by *Target Analytics* for the Giving Score. For more information about how to submit your data through the Data Health Center, see the *Data Health Center Guide*.

You can display up to 255 panels on each Dashboard page. You can create an unlimited amount of these pages in Dashboard. They display on the shell of T***he Raiser's Edge 7*** when you click Dashboard on the Raiser's Edge bar. Only one Dashboard page can be selected at a time. To choose this page, select a Dashboard on the Dashboard page action bar.

Giving Score Rating Summary

You can use the Giving Score Rating Summary panel to analyze a summary of how your data was scored for the Giving Score. The Giving Rating Summary Score panel provides the number of constituents who received each rating, as well as the number of constituents who received a score of No Rating.

You can edit the parameters of the Giving Score Rating Summary panel to display current Giving Score ratings, or the ratings for any previous instance your data was scored by *Target Analytics*. By default, the panel displays results for current Giving Score ratings. You can also select to display the percentage of constituents who received each rating.


Giving Score

As of 07/06/2011 10:37:19 AM

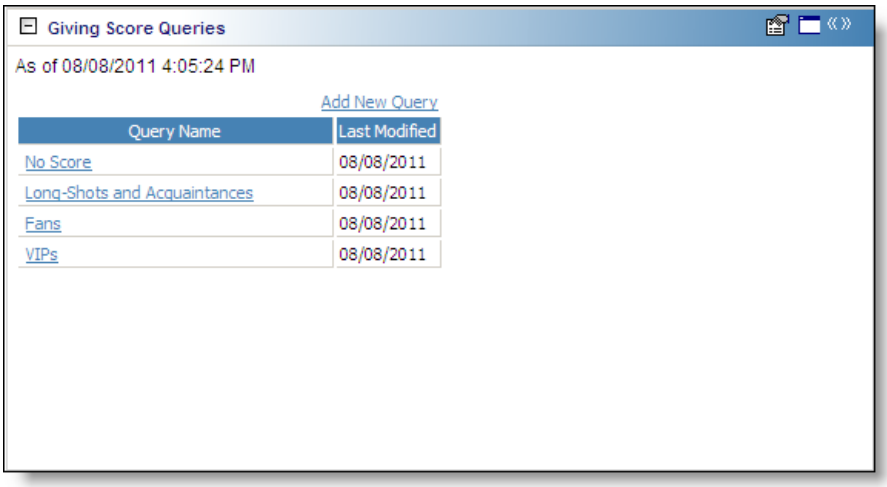
Giving Score	Number Scored	% of Scored	% of Database
VIP	23	14.84%	9.47%
Fan	36	23.23%	14.81%
Long-Shot	2	1.29%	0.82%
Acquaintance	94	60.65%	38.68%
No Score	88	N/A	36.21%
	243		

Any selections you make on the Edit Giving Score Rating Summary Panel save when you click **OK**. These selections do not change unless you edit or delete Giving Score from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Giving Score Queries

You can use the Giving Score Queries panel to view each Giving Score query created in your system. Giving Score queries allow you to create lists of constituents based on their Giving Score ratings, such as to make a list of all your VIP’s for use in a mailing. For information about Giving Score queries, see the *Query Guide*.

You can edit the parameters of the Giving Score Query panel to display a specific number of queries, as well as view who each query was created or modified by. You can also select to limit the queries that are displayed on the panel to only the queries you have created. By default, the panel displays eight Giving Score queries, not limited to only the queries you have created.


Giving Score Queries

As of 08/08/2011 4:05:24 PM

Add New Query

Query Name	Last Modified
No Score	08/08/2011
Long-Shots and Acquaintances	08/08/2011
Fans	08/08/2011
VIPs	08/08/2011

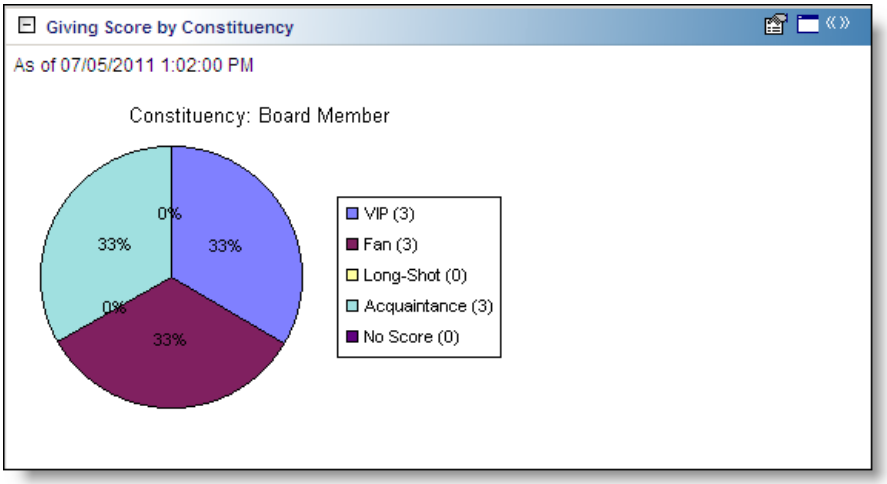
From the Giving Score Queries panel, you can click **Add New Query** to create a new Giving Score query. When you click the button, the Add Giving Score Query screen appears. For information about how to create a Giving Score query, see the *Query Guide*.

Any selections you make on the Edit Giving Score Queries Panel screen save when you click **OK**. These selections do not change unless you edit or delete Giving Score Queries from the Customize Dashboard panel. For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

Giving Score by Constituency

You can use the Giving Score by Constituency panel to view the number of Giving Score ratings for each constituency, such as to view the number of board members who were given each rating.

You can edit the parameters of the Giving Score by Constituency panel to display results for any constituency, and select whether the output of the panel displays as a table, graph, or a table and graph. By default, the panel displays as a pie chart. You can also select to display the percentage of the selected constituency each Giving Score rating accounts for.



Any selections you make on the Edit Giving Score by Constituency Panel save when you click **OK**. These selections do not change unless you edit or delete Giving Score by Constituency from the Customize Dashboard panel.For information about how to edit a panel, see “Open and edit a panel” on page 20. For information about how to delete a panel, see “Delete a panel” on page 39.

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