



Fund Development Officer / Major Gifts New Reporting

To report activity by development staff, we have used the Acquisition Number on a receipt transaction record. In some cases, this is not adequate. As a response to the YESS team, we have added a Quality or Membership value to the Donation Acquisition Report.

How this works: Sharron is the development office responsible for the Normans and the McDonald family. We have added a Quality in the Lookup Tables ...which looks like AM: Sharron ...The other account managers were also added.

A report will show by Quality value the gifts received by Date ... what a great way to trace the success of your development staff.

This method can also be used for Teams, so add a Team quality as well as the account manager values for the individuals on the team.

Step 1:

Create the necessary Quality Values:

We added AM Team A ... team members are John, Howard and Sharron.

We added individual account managers, John, Howard and Sharron.

Lookup Table Maintenance

Quality

Quality
Access: Email
Access: Mail
Access: Phone
AM Team A
AM: John
AM: Howard
AM: Sharron
Board Change 01: Jan
Board Change 02: Feb
Board Change 03: Mar
Board Change 04: Apr
Board Change 05: May

Changes to these values will be reflected in the existing records

OK Cancel

Step 2:

To the Norman and McDonald donor profile we added two qualities.

AM: Sharron and AM Team A.

Fund Development Officer / Account Manager Major Gifts Report



@ Profile for George & Mary Norman

Volunteer Summary	Volunteer Recognition	Volunteer Interests	Volunteer Credentials
Donor Summary	Donor Recognition	Donor Interests	Supported Campaigns
Membership	Qualities	Notes	Relationships

Qualities	
Once a Year 11: Nov	
Invite to Gala	
Invite to Conference	
AM: Sharon	
AM: Team A	

To the Kate George Profile we added two qualities.

AM: John and AM Team A.

Please Note: If the Membership is used it is date specific. Where the date is left blank, the report will use only the membership name selected or checked.

Step 3: The Donation Acquisition Report

@EASE Fund Development Software

Welcome Administrator

File View Donor Volunteer Campaign Receipting Pledge Q-Xpress Year End Window Help

ABC Foundation

Reports

Private Donor Reports

Corporate Donor Reports

Campaign Reports

Donor Receipting

Receipt Batch Report

Demographic Summary Report

Donation Analysis Report

Campaign Prospect Report

Donation Acquisition Report

Pledge Batch Report

Pledge Transaction Report

Pledge Transaction Declined Report

Incomplete Donation Handling Report

On-Going Pledge Build For New Calendar Year

Pledge Demographic Summary Report

Expiry Date Renewal Report

Receipt Breakout Report

Tickets Not Sold Report

Breakout Donations by Campaign

Lottery Ticket Confirmation Report

Donation Acquisition Report

Volunteer Number Range

From: To:

By Membership

By Quality

From: Sep 23, 2019 To: Sep 27, 2019

Campaign Type

AN - Annual Major Gifts

BQ - Bequest

BR - Branch Donations

CN - Conference

CS - Christmas Family Spons

DM - Direct Mail

EA - Education Awards

ED - Educational Programs

GA - Gala

GM - Gaming

Campaign Code

AUC - Auction Items

D01 - Quarter 1

D02 - Quarter 2

D03 - Quarter 3

D04 - Quarter 4

DCL - Declined Grant Request

DON - Donations

E01 - Introduction to Technolo

FML - Family Membership

GIK - Gifts in Kind

Campaign Year From: To:

Full Report Summary Report

Select

Quality List

000AcquiredBy

000SnoopSharron

000ParticipantRecognition

Access: Email

Access: Mail

Access: Phone

AM: Howard

☒ AM: John

☒ AM: Robert

☒ AM: Sharon

☒ AM: Team A

Board Change 01: Jan

Board Change 02: Feb

OK Cancel

The Volunteer Number remains blank for this specific report.

Step 4: Select the account managers to report.

Click on Quality and checking off the AM account manager values and Teams to be reported.

Fund Development Officer / Account Manager Major Gifts Report



Enter the **date range** to be reported.

Only those donations in the date range given, where one or more of the AM qualities are attached to the master record, will report. Each will start on a new page.

Account Manager Report

Donation Acquisition Report by Quality							
By Quality and Receipt Date Between Sep 23 2019 and Sep 27 2019							
Donor	Name/Corporation	Ticket #	Date	Paid	Amount	Receipt #	Campaign Upd Void
Quality	AM: Sharron						
P000023	McDonald Peter & Beth		Sep 27, 2019	Cheque	100.00		2019DMD04 N N
P000045	Norman George & Mary		Sep 27, 2019	Cheque	75.00		2019DMD04 N N
Summary	Quality	AM: Sharron					
Total Amount		175.00	*Non-Charitable Amount:		0.00	Charitable Amount:	175.00
Charitable Gifts:	Donations:			Computer Receipts:	0.00	Manual Receipts:	0.00
	Donation Count:	2		Computer Receipts:	0	Manual Receipts:	0
Non Charitable Gifts:	Donations:			Computer Receipts:	0.00	Manual Receipts:	0.00
	Donation Count:	0		Computer Receipts:	0	Manual Receipts:	0
Registration Amount:		0.00					

Team A Report

Donation Acquisition Report by Quality							
By Quality and Receipt Date Between Sep 23 2019 and Sep 27 2019							
Donor	Name/Corporation	Ticket #	Date	Paid	Amount	Receipt #	Campaign Upd Void
Quality	AM: Team A						
P000023	McDonald Peter & Beth		Sep 27, 2019	Cheque	100.00		2019DMD04 N N
P000045	Norman George & Mary		Sep 27, 2019	Cheque	75.00		2019DMD04 N N
Summary	Quality	AM: Team A					
Total Amount		175.00	*Non-Charitable Amount:		0.00	Charitable Amount:	175.00
Charitable Gifts:	Donations:			Computer Receipts:	0.00	Manual Receipts:	0.00
	Donation Count:	2		Computer Receipts:	0	Manual Receipts:	0
Non Charitable Gifts:	Donations:			Computer Receipts:	0.00	Manual Receipts:	0.00
	Donation Count:	0		Computer Receipts:	0	Manual Receipts:	0
Registration Amount:		0.00					