

Useful Donation Reports

<i>Speech</i>	<i>Cursor Actions</i>
When you click Reports, you'll find dozens of useful donation reports, grouped into four categories: Donations, Donations-Reconciliation, Donations-Soft Credit, and Donors.	Show Console. Click Reports. Point to 4 groups of donation reports.
Under Donations, there are several reports usually used by fundraising and development staff. When you click the name of a report, a description of the report appears below.	Expand Donations. Click a report name. Point to the description.
Maybe you want to see donations broken down by donation types like <i>individual</i> and <i>business</i> . The report "by donation type" will give you this information.	Select by donation type report.
To run this report, click report.	Click Report.
Select your date range...	Choose Prior 366 Days.
And click OK.	Click OK.
Sumac then shows you a report listing the donations that were made within the last year, organized by donation type.	Show the report on the screen.
When you are satisfied, click Print or Save.	Hover over Print. Hover over Save.
Note that when you save a report to a file, it is saved as a tab-delimited text file that can be opened in a spreadsheet program.	Click Cancel. Click to contract Donations reports.
Donations – reconciliation reports are generally useful for your accountant or bookkeeper, or for auditing purposes, as they are relevant to the financial information of your organization.	Expand Donations – reconciliation reports.
Donations – soft credits reports are useful to show the soft credits that have been attributed to your donors.	Expand Donations – soft credit reports.
Donors reports are often most useful to development or fundraising staff. They focus on the donors, rather than the donations, and do special things...	Expand Donors reports.
like identify lapsed donors, and create a donor roll.	Point to lapsed (LYBUNT, SYBUNT) report. Point to donor roll report.
There are a couple of acronyms used in the titles of the lapsed report: LYBUNT and SYBUNT. LYBUNT means last year but not this year, SYBUNT means some year but not this year. Sumac's lapsed donor report lets you specify the time periods of interest, so it can do LYBUNT, SYBUNT, and many other variations.	Point to lapsed (LYBUNT, SYBUNT) report. Collapse Donors reports.

<p>Finally, there is another group of reports that may be relevant when you are investigating donations: The Campaigns reports. If you use campaigns and record campaign information in donation records, then there are several reports that give you a different way of analyzing donations.</p>	<p>Expand Campaigns reports.</p>
<p>If there is a report you need that is not here, let us know! We have a standing offer – that if it’s not there, we’ll create it for you!</p>	
<p><i>Check out more training videos, to learn more about what Sumac can do!</i></p>	