

## How to Navigate through FR 50 Reports



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**This article applies to: Sage Fundraising 50 – all versions**

Below is a quick overview of the report categories and what to expect from within each category.

Please remember that every Standard Report (those that are supplied with the product) has a brief description of what type information is returned from the report. Every Standard report is unique in its capability to be manipulated via the Tabs within the report Setup option. Many reports are 'hard coded' and do not allow for any manipulation as to the format or information detail returned. Other reports have the capability of being manipulated in almost any fashion. You merely have to access the Setup function after selection of a report to review that particular report's flexibility. If a tab within report Setup does not display a particular feature or option, then you have to search for another report to fulfill your needs. The most accommodating reports are those with the word Export in their titles.

Along with the supplied short definitions listed with each report, a quick click on the Help selection from the upper Tool Bar will allow you to search by the specific report names. The Help section includes a template of each report so you can easily review the formatting of the report along with the type information it will extract and display.

**Constituent Report Category:** Return information based on a constituent's entire record. Constituent reports are summary type reports and do not provide detailed information from within a constituent's record. For example, if you want a listing of all constituents who have given to a particular campaign without any detail as to the number of gifts or gift amounts, you would select a report from this section. These reports are usually used for creating mailing labels, constituent lists, or reports that do not require fields to be printed from cards other than the Basic card.

**Financial Report Category:** Return detailed information about a constituent's record. These reports are accessing and in turn printing information from individual cards in a constituent's record. Financial reports are detailed reports used when you need to have detailed information about your constituents. For example, you would like to see a listing of all constituents who have given to a particular campaign along with the actual individual gift information such as Gift date and Gift amount. These reports have the capability of accessing and printing information from particular cards within a constituent's record.

**Analytical Report Category:** Return overview information about your constituent database as a whole. These reports look at constituent records in a statistical manner and return information about your constituent database. They do not give you individual record information but rather some type of analysis about the records as a whole.

## How to Navigate through FR 50 Reports – cont'd

**Volunteer Report Category:** Analyze the information entered on Volunteer cards in the system. The reports can return both detailed and summary as well as analytical information about your volunteer cards.

**Event Report Category:** Analyze the information entered on Event cards in the system. The reports can return both detailed and summary as well as analytical information about your Event cards.

**Membership Report Category:** Return information on gifts entered as Membership type transactions. These reports work off of your Membership Level table from within the Table Maintenance section. They also utilize the information established from the Membership tab on your System Options. (Admin>Setup>System Options) Most reports within this section are analytical type reports, based on the entire membership entries within your database.

**Grant/Prospect Report Category:** Return information based on Proposal and Contact cards established for constituent records. Reports return both detailed information as well as analytical information.

**Other Report Category:** Return information based on Contact cards and Relationship cards established within constituent records.

**Receipts Category:** List of Receipt types produced by the system, which are based on information on Gift card entries that utilize the Receipt Type field. The receipt function requires setup via the Admin menu selection (Admin>Setup>Receipts) and Table Maintenance (Receipt Messages). This is a listing of receipts that Fundraising 50 is able to print for tax purposes as well as two reports that return information about the receipts printed. Before utilizing this section of Fundraising 50, please be certain you have setup all the proper parameters.