

# Step-by-step NeonCRM to Fundraising Report Card Guide



# 1 Login to NeonCRM

## Account Login

Login Name:

zsharfska@imarketsmart.com

Password: [Forgot Password?](#)

.....

Remember me for 2 weeks.

LOG IN

-----  
[Create an account](#)



Powered by NeonCRM

## 2 Click on reports -> new report



Account



Fundraising



Reports



Home/Dashboard

New Report

One-Click Report

Executive Reports

Saved Report

Auto Reports

Stats Report

Duplicate Manager

Menu

Communications



System Settings



My Account



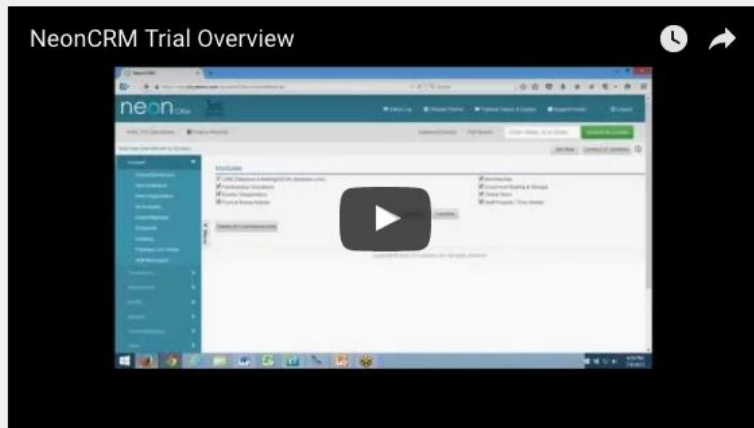
Forms & Pages



Edit Content

## Welcome to your NeonCRM trial!

Start with this video:



Please be aware of the following restrictions of NeonCRM trial systems:

- Email blasts cannot be sent via trial systems due to potential violations of CAN SPAM Act Laws

### NeonCRM Updates

#### December 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

### To Do List

Favorite Accounts: 0

Merges In Progress: 0

Pending Merges: 0

Materials To Send: 0

Failed Transactions: 0

### Scheduled Duplicate Scans

Configure Scheduled Scans

### 3 Click on *donation* -> *donation detail report*



- Account >
- Fundraising >
- Reports ▾

- Home/Dashboard
- New Report
- One-Click Report
- Executive Reports
- Saved Report
- Auto Reports
- Stats Report
- Duplicate Manager

Menu

- Communications >
- System Settings >
- My Account >
- Forms & Pages >

## New Report

### Communication And Mailing

#### Donation ▶

#### Donor

### Transaction And Payment

#### Campaign

#### Activity

### Donation

#### Donation Detail Report

Retrieve donation data as well as donor contact information.

#### Declined Donation Report

Declined and pending donations.

#### Honor/Memory Donations

Retrieve Honor/Memory donations in your system.

#### Matching Donation Report

Lists donations and associated matching gifts.

#### Pledge and Payment Report

List Pledges and their current status, payment amount, write-off amount, etc.

#### Installment Report

List pledge payment installments and their current status, payment amount, write-off amount, etc.

#### Recurring Donation Report

Retrieve your currently active recurring donations and their payment status.

#### Soft Credit Report

Donations that have a Soft Credit Recipient.

## 4 Click edit criteria



Account >

Fundraising >

Reports ▾

Home/Dashboard

New Report

One-Click Report

Executive Reports

Saved Report

Auto Reports

Stats Report

Duplicate Manager

Menu

Communications >

System Settings >

My Account >

Forms & Pages >

# Donation Detail Report

Back

Run Report

### Search Criteria

#### Report Scope

The results will list **Donations**.

(Tip: Donations can include Donations, Pledges, Pledge Payments, and Matching Pledges)

No additional criteria selected.

Edit Criteria

### Output Columns

This report will display the following columns:

- Account ID
- Donation Amount
- Donation Date

Edit Columns

## 5 Set donation amount greater than 0

**Edit Search Criteria** ✕

**Report Scope**  
The results will list **Donations**.  
(Tip: Donations can include Donations, Pledges, Pledge Payments, and Matching Pledges)

**Search Group 1 Clear**

**Donation** Donation Amount ▼ Greater Than ▼ 0

**+ Add Criterion**

**+ Add Search Group** **Exclude From Results** **Search Within Results**

**Cancel** **Load Criteria**

## 6 Click load columns



Account >

Fundraising >

Reports ▾

Home/Dashboard

New Report

One-Click Report

Executive Reports

Saved Report

Auto Reports

Stats Report

Duplicate Manager

Menu

Communications >

System Settings >

My Account >

Forms & Pages >

# Donation Detail Report

Back

Run Report

### Search Criteria

#### Report Scope

The results will list **Donations**.

(Tip: Donations can include Donations, Pledges, Pledge Payments, and Matching Pledges)

This report will display **Donations** where:

- Donation Amount is Greater Than "0"

Edit Criteria

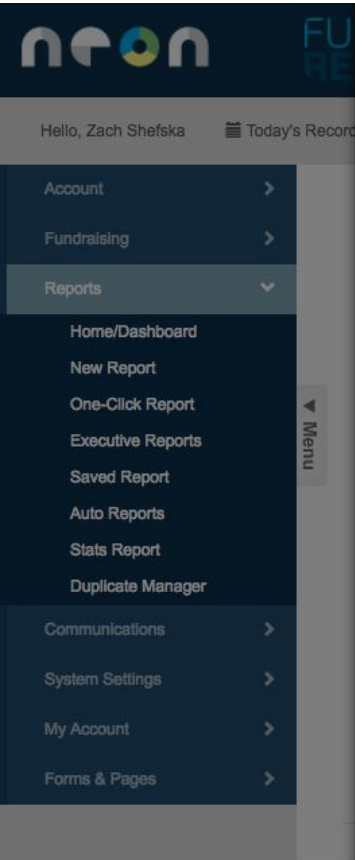
### Output Columns

This report will display the following columns:

- Account ID
- Donation Amount
- Donation Date

Edit Columns

## 7 Select Account ID, Donation Amount, Donation Date (optionally, check the box to save as default output for the kind of report.)




neon FU RE

Hello, Zach Shefska Today's Record

- Account >
- Fundraising >
- Reports ▾
- Home/Dashboard
- New Report
- One-Click Report
- Executive Reports
- Saved Report
- Auto Reports
- Stats Report
- Duplicate Manager
- Communications >
- System Settings >
- My Account >
- Forms & Pages >

Menu

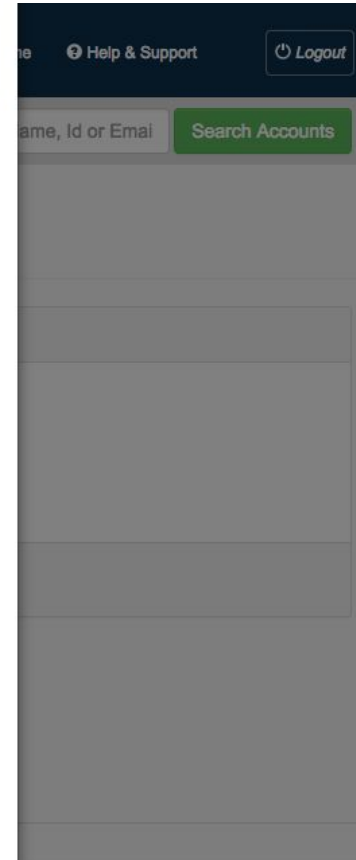
 **Neon Reports : Fields Selector** ( F:composite column C:custom column )

You can drag and drop a column from the section of the available fields on the left to the "Selected" area on the right.  
You can also drag and drop a column within the "Selected" area to adjust display sequence.

### ItemSelector

Field Selector:	Available	Selected
	<input type="text" value="enter search term"/>	<input type="button" value="Clear"/>
	Account Created By	Account ID
	Account Created Date/Time	Donation Amount
	Account Last Modified By	Donation Date
	Account Last Modified Date/Time	
	Account Login Name	
	Account Type	
	Acknowledgee Email	
	Acknowledgee Name	
	Acknowledgee Prefix	
	Acknowledgee Suffix	
	Address Created By	
	Address Created Date/Time	
	Address Last Modified By	
	Address Last Modified Date/Time	
	Address Line 1	
	Address Line 2	
	Address Line 3	
	Address Line 4	
	Address Type	
	Anonymous Donation	
	Bank Account Number	
	Blogger Name	
	Campaign Code	
	Campaign End Date	
	Campaign Goal	
	Campaign ID	

Save as default output for the kind of report.



Help & Support

ame, Id or Email



## 8 Click *run report*

The screenshot shows the 'Fundraising Report Card' interface. The top navigation bar includes the logo, 'FUNDRAISING REPORT CARD', and links for 'Action Log', 'Change Theme', 'Help & Support', and 'Logout'. The user is logged in as 'Zach Shefska'. The main content area is titled 'Donation Detail Report' and features a 'Run Report' button. The 'Search Criteria' section is expanded to show 'Report Scope' with a loading modal. The modal contains a circular progress indicator and the text 'Please wait a moment.'. Below the modal, the report scope is defined as 'Donations where: Donation Amount is Greater Than "0"'. The 'Output Columns' section is also visible, showing the text 'This report will display the following columns:'. A 'Menu' button is located on the left side of the page.

Account >  
Fundraising >  
Reports ▾  
Home/Dashboard  
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Executive Reports  
Saved Report  
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Communications >  
System Settings >  
My Account >  
Forms & Pages >

Menu

Hello, Zach Shefska Today's Records

Advanced Search Full Search Enter Name, Id or Email Search Accounts

# Donation Detail Report

Back Run Report

Search Criteria

**Report Scope**  
The results will list  
(Tip: Donations can be filtered by date range)

Please wait a moment.

This report will display **Donations** where:

- Donation Amount is Greater Than "0"

Edit Criteria

Output Columns

This report will display the following columns:

Edit Columns

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## 9 Click *export results*, select *CSV*



# Results

### Donation Detail Report - Standard Report

Configure Report

Save Report Configuration

Export Results

2075 Total Page ( 1 of 104)

Account ID	Donation Amount	Donation Date
1416	780.69	05/06/2012
1055	566.72	12/25/2009
1055	8065.40	01/26/2016
1056	1814.31	03/10/2016
1056	340.16	10/16/2007
1057	5981.72	01/08/2016
1057	445.66	01/08/2012
1058	872.98	06/25/2014
1058	5041.30	02/15/2016
1059	3119.95	04/04/2016
1059	425.78	08/15/2005
1060	676.27	09/20/2013
1060	2055.90	01/23/2016
1062	3479.45	02/26/2016
1062	557.25	05/26/2010
1063	3712.05	01/30/2016

Excel

CSV

Print Current Page

## 10 Upload the file (named *export.csv*) to Fundraising Report Card

Data Center

Help

Integrations

My Account

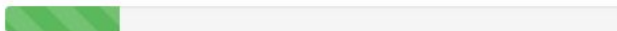
Help Center

Log Out

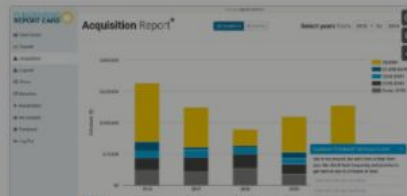


### Uploading...

Great job! Your file is being uploaded, hang tight.



Getting stuck?



	A	B	C
1	donor_id	donation_date	gift_amount
2	123456	1/22/05	\$20.00
3	123457	3/15/08	\$250.00
4	123458	5/7/11	\$397.00
5	123459	6/28/14	
6	123460	8/19/12	
7	123461	10/10/10	

After Hours Help