Constituent Reports

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new Veracross Community. Please update your bookmarks.

Here is the new version of this article in the Veracross Community.

Overview

Constituent reports can be created using the Advanced Report functionality specific for Development purposes. You can read more about advanced reporting here. There are two primary scenarios for when to use the development tab of an advanced report.

Informational Purposes

Sometimes advanced reports are used to retrieve some giving information about the members of your mailing.

Filtering Results

Sometimes advanced reports are used to further refine the results of your mailing list.

Before using the Development portion of the advanced reports, read over the generalAdvanced Reports documentation to gain an understanding of how to build an advanced report. Once the initial creation of reports is clear, refer to the documentation below to better understand how to use the Development tab within reports.

Informational Purposes

The Development tab can be used to retrieve information about the members of your mailing list. This is done by defining up to five different amounts that should be displayed for the members of your mailing list. These amounts are constructed by configuring various inputs. Those inputs are as follows:

Amount Criteria

Donations, Soft-Credit, Pledges, and Pledge Soft Credit

These checkboxes define the “type” of gifts to be included in the amount.

Apply-to-Pledge (applies to Donations only)

Narrow the results to donations that are only applied to pledges or those that aren’t applied to pledges. When looking for both donation and pledge amounts, set this field in accordance with Pledge Amount Type in one of the below ways in order to avoid double counting amounts:

- Apply to Pledge = No with Pledge Amount Type (see below) = Total Amount
- Apply to Pledge = Yes with Pledge Amount Type (see below) = Total Outstanding

Soft-Credit Type (applies to Soft-Credit only)

Define the different kinds of soft credits that should/should not be included. By default, household soft credits will not be included in any amount totals to avoid double counting.

Pledge Amount Type (applies to Pledges only)

The pledge amount defines the different kinds of amounts for pledges to include in your total. These different amounts are as follows:

- Total Amount: The total amount pledged
- Total Received: The total amount received towards the pledge
- PTD Received: The total amount received towards the pledge as of the Pledge Reference Date
- Total Outstanding: The total amount of the pledge minus the total amount of donations and writeoffs which have been made towards the pledge
- PTD Outstanding 1: The pledged amount expected minus any received payments or writeoffs, all as of the pledge reference date. In other words, this field does not consider any gifts (donations, pledge installments or writeoffs) after the pledge reference date.
- PTD Outstanding 2: PTD Total minus Total Received and Total Writeoffs. In other words, the amount of money owed as of the pledge reference date minus any donations or writeoffs applied to this pledge up to the present.
- Total Amount – Writeoffs: The total amount pledged minus the total amount written off.

Campaign, Fund, Event

Define which campaign, fund, event should be included/excluded in each amount total.

Profile Code

Define which gift profile code should be included/excluded in each amount total.

Begin Date & End Date

These dates are used to filter which donations, pledges and/or soft credits to consider when calculating the amount. These dates correspond to the receipt date for donations and soft credits and to the pledge date for pledges.

Matching Status

Define if gifts that have a particular matching status should be included/excluded in each amount total.

Payment Method (applies to Donations only)

Define if gifts that have a particular payment method should be included/excluded in each amount total.

Include/Exclude

Amount Definition

The include/exclude field for each component of the amount allows you to add or subtract together different amounts. Components that are included are added to the resulting column total while those that are excluded are subtracted.

NOTE: If an amount definition (row) is set to include a particular gift, marking “exclude” on a new row will not take away from what has been included. For example, if the Fund “Any” is chosen in the first row to “Include” in Amount 1 and in row 2 for Amount 1, a particular Fund is marked as “Exclude”, that fund will actually not be excluded. A row per fund to include should be added instead of the row to exclude.

Grand Total

Optionally, the different defined amounts (none, any or all) can be included in a grand total. This grand total will be the sum of each of the amounts which are marked as “Include in total”.

Gift Amounts

Once each of the amount columns has been defined, update the report and view the results from the “Gift Amounts” button in the toolbar of the report. This will give a query results of the people in the advanced report with the amounts, as defined in the report, in the output.

Amount Descriptions

The description fields on the Development tab of the advanced report are for reference purposes only. If there is a need to override the column description for one of the amounts in the query, the field properties can be adjusted to have a new description and the query will need to be saved. The column description can be overridden by right clicking on the field, going to Field Properties and entering an “Override Description” on the Amount field.

Further Results Filtering

In addition to gathering giving information about the members of the advanced report (as mentioned by defining amount fields above), the Development tab can be used to further limit the members of the report based on their giving information. This is done by first defining different amounts using the steps given above, then setting up minimum and maximum amounts for each amount column. These minimums and maximums are applied after the giving information has been calculated and will limit the households/organizations in the report results based on whether or not they have reached that minimum or maximum. Note, either a minimum or maximum or both can be set to filter the results.

If the goal is to look for donors who have not given to the criteria specified for a column amount, set the maximum amount to -1.

Finally, if min/max ranges are specified for multiple amount columns, a donor will have to meet both of those sets of criteria in order to be included in the final results.