

Mogiv Tutorial

How To Use Reports



At Mogiv, we understand that fundraising is about more than dollars and cents. It's about developing long-lasting relationships with the people who support your organization. Our reports are designed to provide you with the real-time insights and information you need to engage with your donors on a deeper level.

Step 1: Click the Reports tab

- ▶ To access Mogiv's reporting suite, simply click the "reports" tab on your dashboard.
- ▶ On this screen, you will see the types of reports available to you listed across the top.



Step 2: View a summary

- ▶ The Summary Report – as the name suggests – provides an overview of all your giving through Mogiv.

Note: Similar to the "Campaigns" page, any inactive campaigns will be moved to the bottom of the list.

The screenshot shows the 'Summary' report. It includes a table with the following columns: CAMPAIGN NAME, START DATE, STATE, GIVERS, FOLLOWERS, TRANS., GROSS GIVING, FEES, and NET. The data rows are:

CAMPAIGN NAME	START DATE	STATE	GIVERS	FOLLOWERS	TRANS.	GROSS GIVING	FEES	NET
Building Fund	06/01/13	Enabled	6	6	24	\$65.56	\$18.90	\$4706
Community Outreach	11/26/13	Enabled	6	6	49	\$59.27	\$35.54	\$2373
General Giving	05/16/13	Enabled	34	32	443	\$1,091.93	\$297.46	\$794.47
ISP Training	01/06/16	Enabled	0	0	0	\$0.00	\$0.00	\$0.00
Kids Summer Camp 2016	04/05/16	Enabled	0	0	0	\$0.00	\$0.00	\$0.00
Matt_Test	07/28/15	Enabled	0	0	0	\$0.00	\$0.00	\$0.00
Missions	06/10/15	Enabled	1	1	2	\$2.00	\$1.44	\$0.56

Step 3: View a Reconciliation Report

- ▶ The Reconciliation Report is our most detailed report. Here you will find a list of every gift given to your organization – broken out by campaign and updated in real time.
- ▶ With each gift, you can view information about the giver, the funding source, the status of the gift, and a breakdown of the fees.
- ▶ Use the date range fields to set up a custom range, or click any of the "Quick Chart" options to view commonly used reports.

The screenshot shows the 'Reconciliation' report. It includes a table with the following columns: TRANS ID, DATE, FIRST, LAST, METHOD, SETTLED, AMOUNT, FEES, and NET. The data rows are:

TRANS ID	DATE	FIRST	LAST	METHOD	SETTLED	AMOUNT	FEES	NET
26688	10/05/16	Andrew	Clarke	Visa	10/05/16	\$100	\$0.72	\$0.28
26682	10/13/16	Neil	Woodward	Visa	10/13/16	\$150	\$0.73	\$0.77
02208	10/13/16	Andrew	Clarke	Visa	10/13/16	\$100	\$0.72	\$0.28
22626	10/01/16	Judy	Nelson	Visa	10/01/16	\$125	\$0.73	\$0.52

Step 4: Export to PDF or CSV

- ▶ All of Mogiv's reports are updated in real-time, and all can be exported as either a PDF or as a CSV file for easy sharing within your organization.
- ▶ The CSV files also allow for easy integration with a host of other platforms.

Other reports give you visibility into Scheduled Giving, Deposit Batches, First Time Givers, and much more! Our goal is to provide you with as much information as possible so that you can stop worrying about reports and start working on relationships!

Thanks for using Mogiv!