

Cool New Things That You Can Do With Advizor.



Agenda

1. Architecture Update.
2. Analysis Filters.
3. Segment Maps (big update in 7.5).
4. Data Appends.
5. Leaky Bucket.
6. Constants & Variables (7.5).
7. Unique Counts in Summary Sheet (7.5).



GivingDNA™ Architecture

PURPOSE-BUILT FUNDRAISING APPS

Visualize & Activate

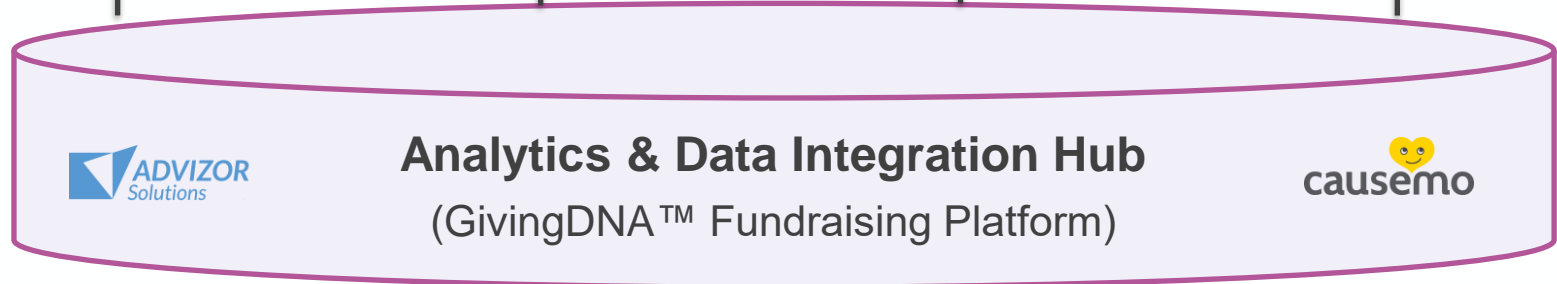
Data Discovery & Analysis

End User Consumption & Activation

Data driven Recommendations

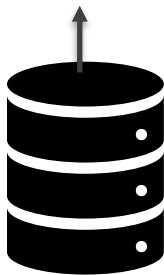
Export to EDW, OBI, MSRS, PowerBI, Tableau ..

Transform



Ingest

Access / Blend / Augment / Synthesize / Model



CRMs



Patient Systems



Other Systems



2. Analysis Filters



New in 7.4

Brand new Analysis Filter


Text Filter → Removal Filter


Individual or Organization?
 Restore Remove All
 Individual
 Organization

Show Deceased?
 Restore Remove All
 False
 True

Show Inactive?
 Restore Remove All
 False
 True

Statistic	ID
Total Count	90,930
Selected	90,930
Unselected	
Excluded	
Removed	2,813

 **Analysis Filter**
An Analysis Filter allows users to select, exclude, and restore data through the use of traditional “check box” and range controls. Analysis Filters operate in much the same manner as our other interactive charts. And since Analysis Filters interact with each other and our other charts to show excluded as well as included populations, they provide users with context for “where am I” in the overall dataset.

 **Removal Filter**
A Removal Filter “removes” rows from the analysis until the user chooses to include them again. “Removed” rows cannot be restored by any other controls in the project. Removed row states can be saved with the project so that the project will reload and open with those rows removed. A great use case would be to generally exclude “deceased” people from a prospect identification project, but allow them to be added back for trending analysis.

Constituent Filter

Current FY Donor?
 No
 Yes

Segment
 1- Lybunt
 2- Sybunt
 3- Non-Donor

Subsegment
 a- 5+ yr consec
 b- 4 yr consec
 c- 3 yr consec
 d- 2 yr consec
 e- Reacquired
 g- 1 yr lapse
 h- 2 yr lapse
 i- 3 yr lapse
 j- 4 yr lapse
 k- 5+ yr lapse
 l- Non-donor

Season Donor
 -
 1- Summer
 2- Oct-Dec
 3- Winter
 4- Apr-Jun
 5- Variable

Upgrade/Downgrade
 -
 1- Upgrd
 2- Stable
 3- Dwngrd

Record Type
 -
 Alumnus/a
 Faculty/Staff
 Friend
 Other
 Parent
 Spouse/Partner

Why:

- Simple “one click” select and exclude
- Intersect across dimensions
- Look and feel similar to common web apps
- Provide “where am I context”
→ Show exclusions from other charts



Example

Summary Leaky Bucket Participation Giving History Giving Funds Gift Details Constituent Giving Appeal Touchpoints Constituent List Map Constituent Codes Degrees Bio Filters

Constituent Filter

Current FY Donor?

- No
- Yes

Segment

- 1- Lybunt
- 2- Sybunt
- 3- Non-Donor

Subsegment

- a- 5+ yr consec
- b- 4 yr consec
- c- 3 yr consec
- d- 2 yr consec
- e- Reacquired
- g- 1 yr lapse
- h- 2 yr lapse
- i- 3 yr lapse
- j- 4 yr lapse
- k- 5+ yr lapse
- l- Non-donor

Season Donor

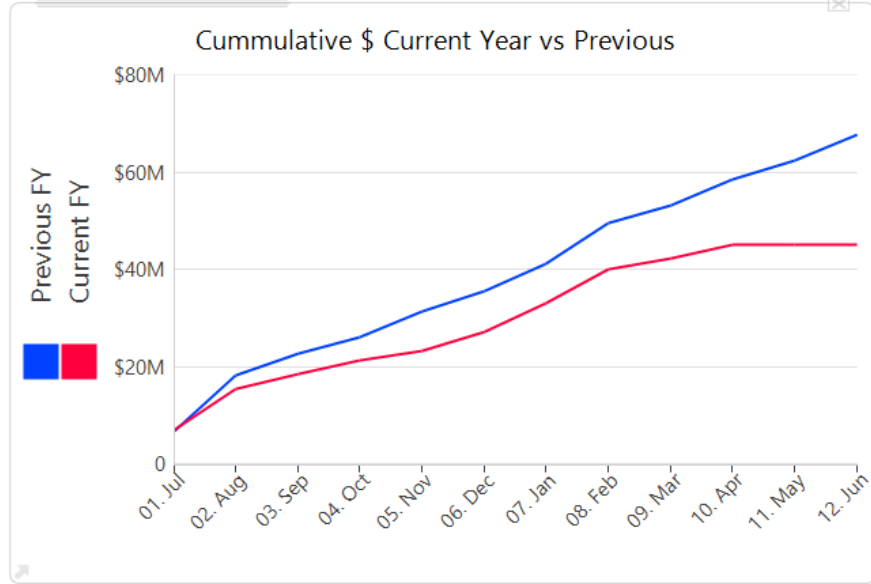
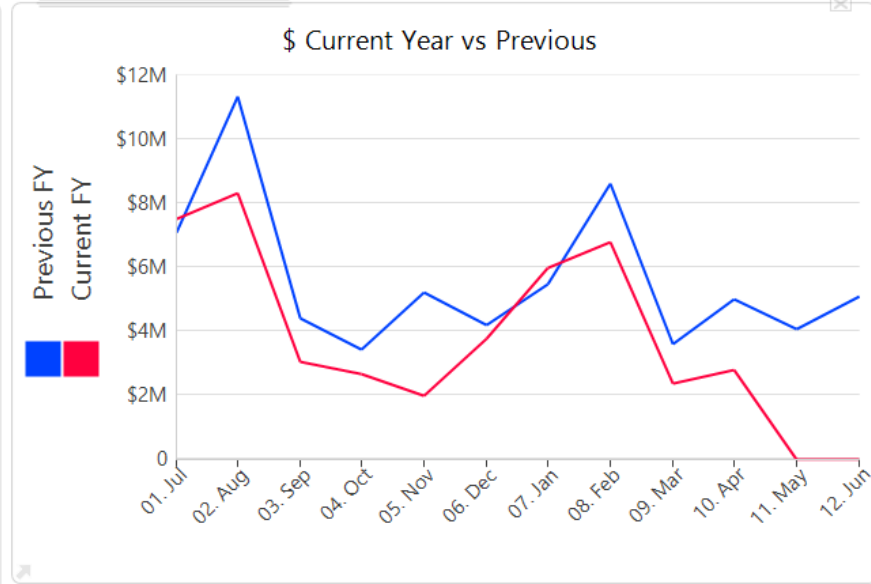
-
- 1- Summer
- 2- Oct-Dec
- 3- Winter
- 4- Apr-Jun
- 5- Variable

Upgrade/Downgrade

-
- 1- Upgrd
- 2- Stable
- 3- Dwngrd

Record Type

-
- Alumnus/a
- Faculty/Staff
- Friend
- Other
- Parent
- Spouse/Partner

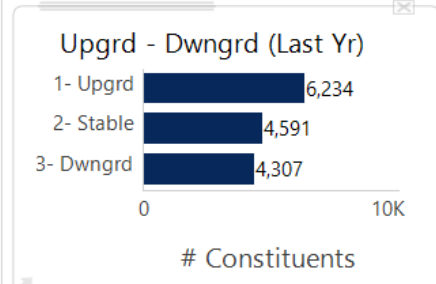
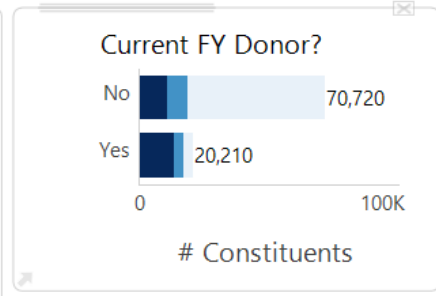
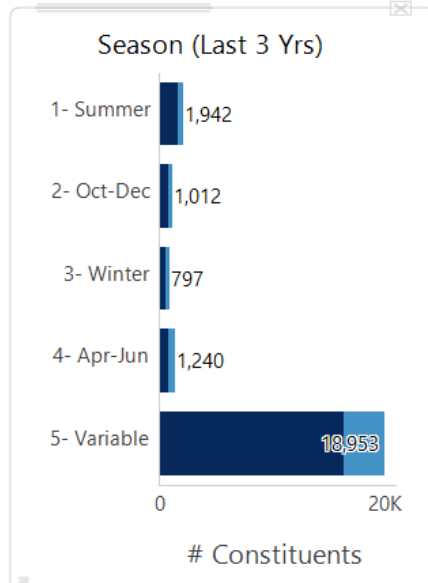
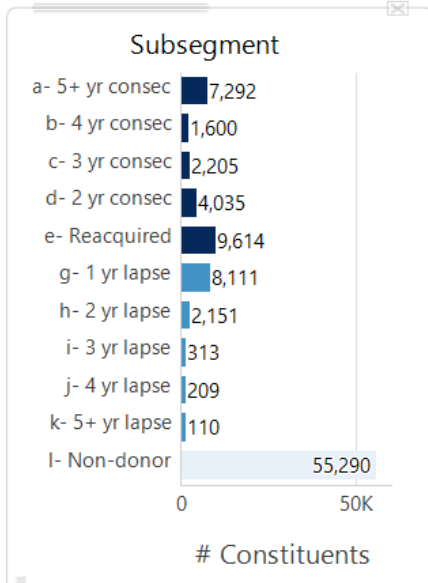
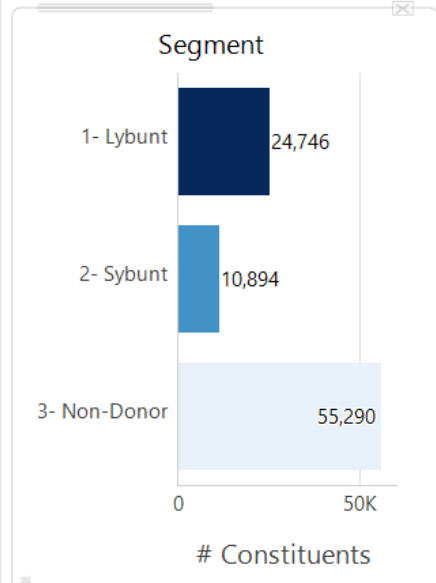


Constituents

Statistic	ID
Selected	90,930

AF Giving Stats (Current FY)

Statistic	Value
Gift \$	\$45,591,199
# Gifts	\$42,471
Avg Gift \$	\$1,073
# Donors	20,210



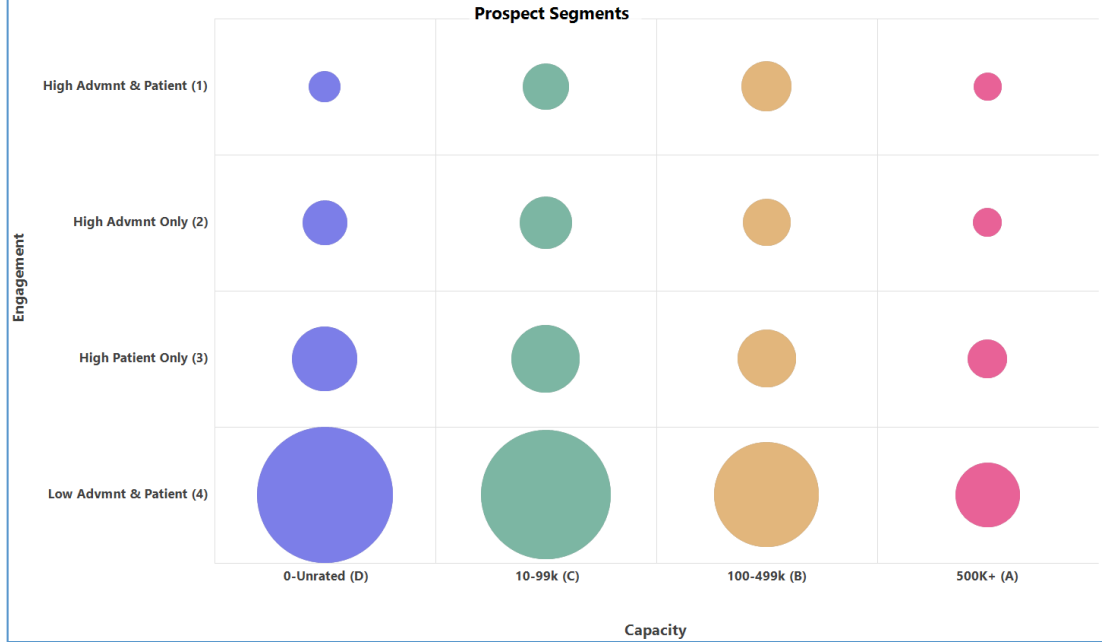
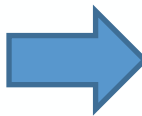
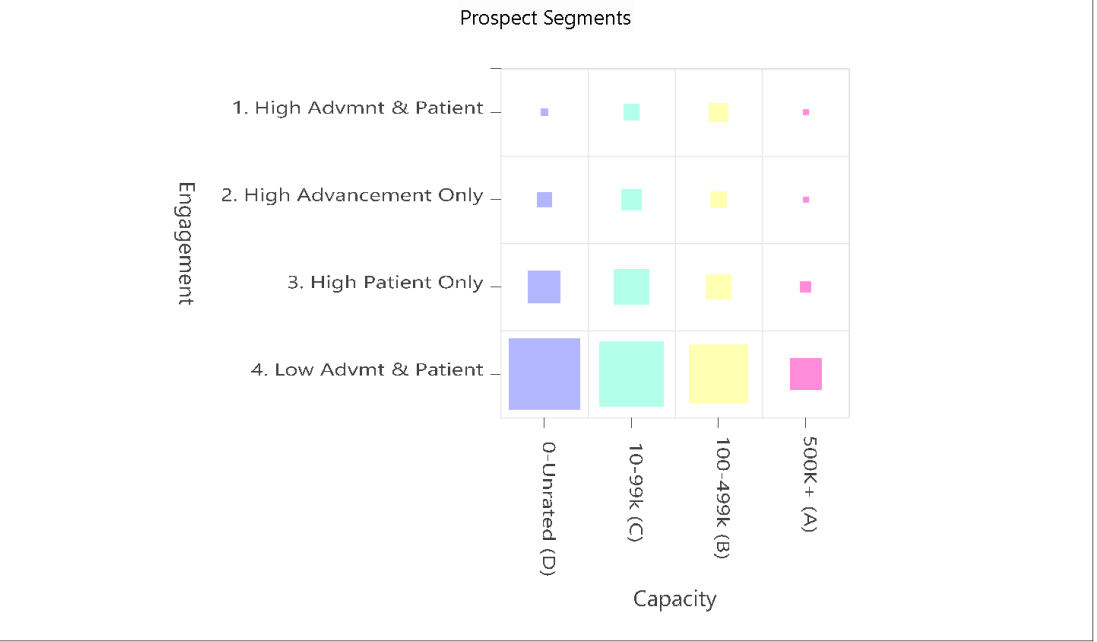
Top Donors CFY

Name	\$ AF CFY
OVERALL	\$45,591,199
Kumar, Damaris	\$4,173,858
Snyder, Camelia	\$3,052,381
Kerin, Crystal	\$1,000,000
Trumbull, Winfr...	\$632,217
McNamara, Dai...	\$598,099
Viorel, Adolph	\$596,000
Krieger, Jack	\$580,425
Konkel, Helene	\$540,866
Colclough, Angel	\$533,615
Hynes, Edgar	\$500,000
Mundt, Georgina	\$500,000
Vandermast, Wi...	\$500,000
Shetty, Bobby	\$499,759
Heim, Buck	\$465,605
Camacho, Huna	\$336,374

3. Segment Maps (7.5 updates)

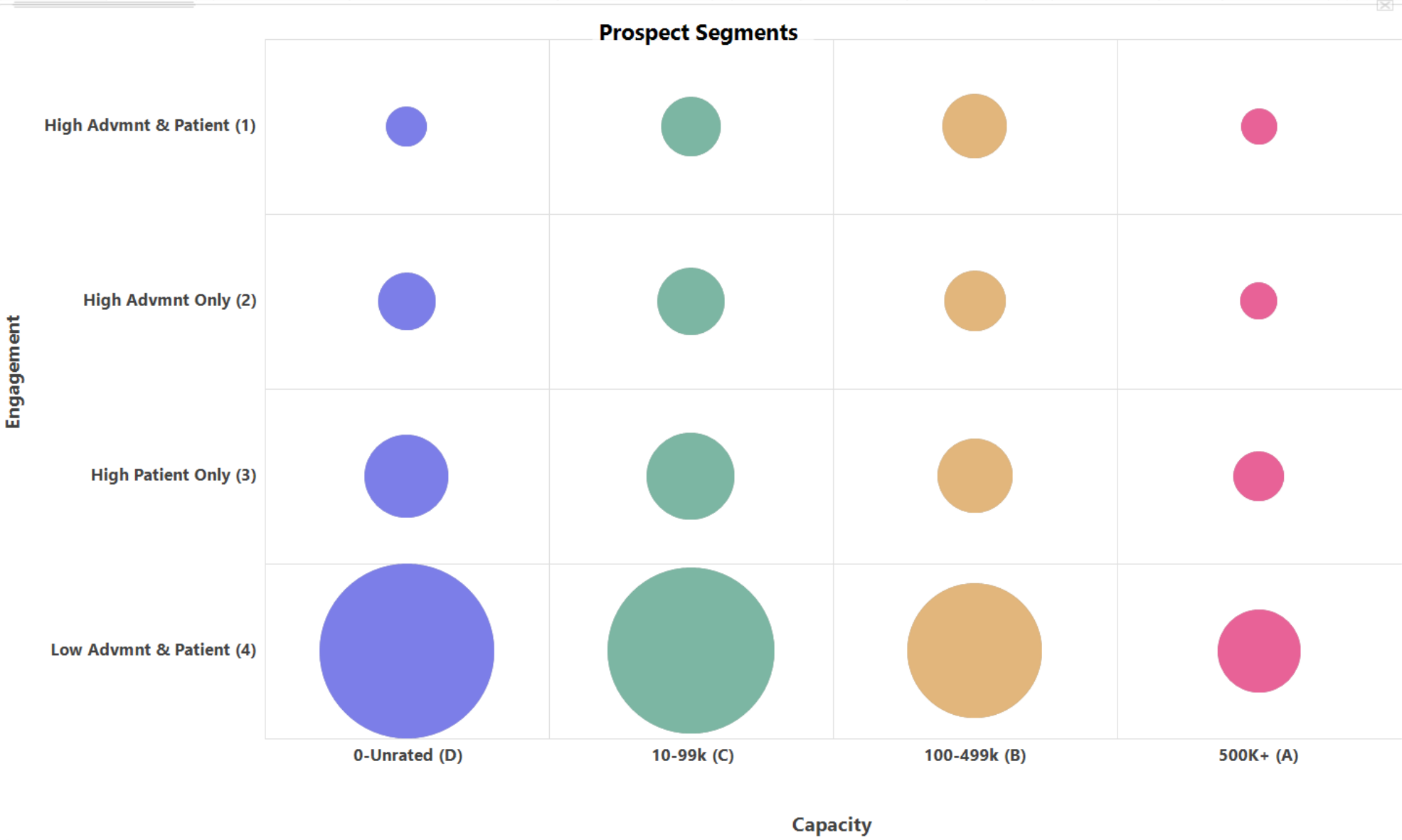


7.4 → 7.5



Segment Prospects

- Prospect List
- Segments
- Capacity Ratings
- Advancement Attachment
- Patient Connection
- Staffing
- Prospect Bio
- Appends
- Map
- Patient Visits
- Details
- Most Recent
- Event Participation
- Giving Summary
- Giving History



Prospects

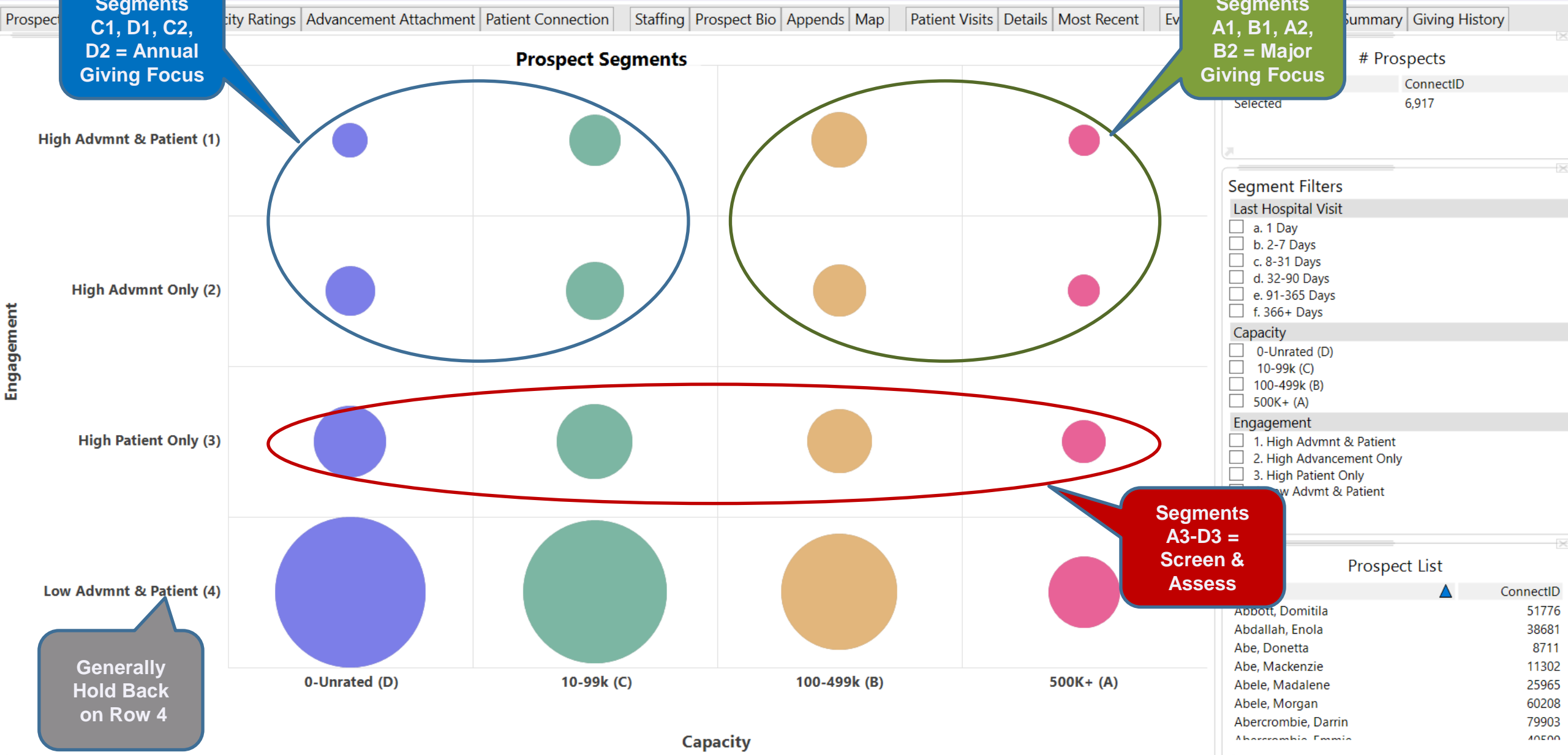
Statistic	ConnectID
Selected	6,917

- Segment Filters
- Last Hospital Visit
- a. 1 Day
 - b. 2-7 Days
 - c. 8-31 Days
 - d. 32-90 Days
 - e. 91-365 Days
 - f. 366+ Days
- Capacity
- 0-Unrated (D)
 - 10-99k (C)
 - 100-499k (B)
 - 500K+ (A)
- Engagement
- 1. High Advmnt & Patient
 - 2. High Advancement Only
 - 3. High Patient Only
 - 4. Low Advmnt & Patient

Prospect List

Name	ConnectID
Abbott, Domitila	51776
Abdallah, Enola	38681
Abe, Donetta	8711
Abe, Mackenzie	11302
Abele, Madalene	25965
Abele, Morgan	60208
Abercrombie, Darrin	79903
Abercrombie, Emma	40500

Develop Strategies



4. Data Appends



Data Appends

Several ways to augment data.
Think pragmatically.

- **Level 1:** Zip Code as a proxy (income, property value)
- **Level 2:** Calculated Wealth Score as a proxy
- **Level 3:** Full Wealth Screen
- **Level 4:** Wealth Screen + Psychographic, Communication Preference, Other Giving, Demographics
- **Other proxies:** Job Level, Country Club, etc.



Level 4 Data Appends

Prospect List Segments Capacity Ratings Advancement Attachment Patient Connection Staffing Prospect Bio **Appends** Map Patient Visits Details Most Recent Event Participation Giving Summary Giving History

Demographic

This page is only Segments A1-A3 & B1-B3 (user set)

Occupation

Professional/Technical	247
Retired	109
Admin/Managerial	73
Homemaker	63
Medical/Professional	62
Sales/Service	40
Clerical/White Collar	38
Financial Professional	31
Self Employed	27
Craftsman/Blue Collar	18

Education

1. Graduate	217
2. Bachelors	297
3. High School	194

Children in Houshld

0	297
1	136
2	110
3	58
4	68
5	22
6+	17

Psychographic & Giving Behavior

Giving Affinity

Charitable	247
Health	97
Religious	96
Political	89
Children	56
Environment/Wildlife	47
Veterans	26
International Aid	23
Policital	18
Other	9

Political View

Democrat	247
Republican	168
Independent	168
No Party	168

Life Stage

Affluent Households	225
Community Minded	93
Top Wealth	93
Solid Prestige	52
Comfortable Households	52
Leisure Seekers	40
Living Well	40
Large Households	27
Working Households	27
Thrifty & Active	27

Communication Preferences

Mail?

Extremely Likely	543
Likley	115
Not Likely	50

Phone?

Extremely Likely	158
Likley	178
Not Likely	372

Digital?

Extremely Likely	165
Likley	207
Not Likely	336

Social Media?

Active User	70
Admin/Managerial	71
Influencer	71
Light User	70
Moderate User	70
Non-User	247
Passionate Influencer	247

Match for Append?

Prospects

Statistic	Name
Selected	980

Segment Filters

Last Hospital Visit

- a. 1 Day
- b. 2-7 Days
- c. 8-31 Days
- d. 32-90 Days
- e. 91-365 Days
- f. 366+ Days

Capacity

- 0-Unrated (D)
- 10-99k (C)
- 100-499k (B)
- 500K+ (A)

Engagement

- 1. High Advmnt & Patient
- 2. High Advancement Only
- 3. High Patient Only
- 4. Low Advmt & Patient

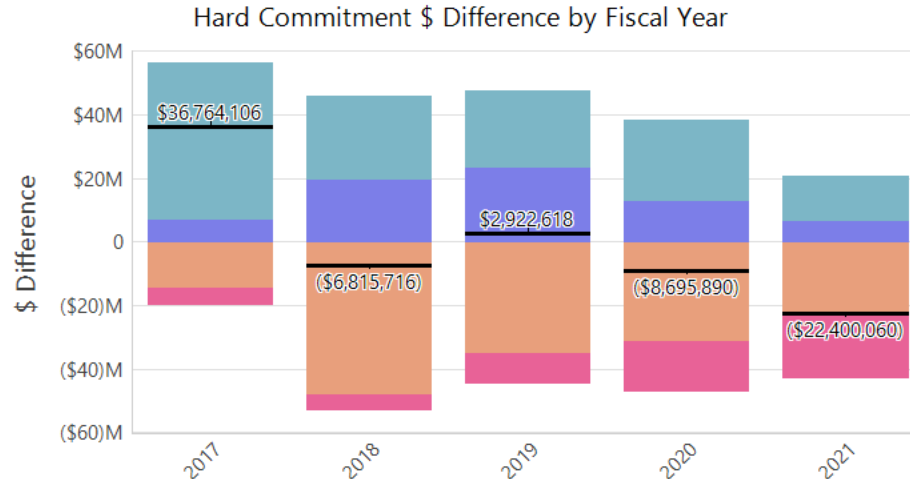
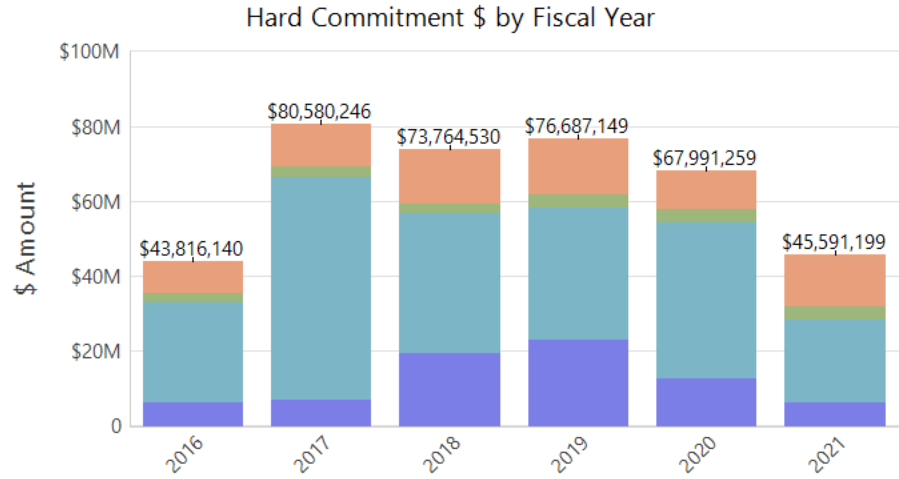
Segments A1-A3 and B1-B3 with Appended Data

ConnectID	Name	Gender	Age	Education	# Children Home	Occupation	Political View	Life Stage	Giving Affinity	Digital?	Mail?	Phone?	Social Media?
79,903	Abercrombie, Darrin	Male	50...	-	-	-	-	-	-	-	-	-	-
572	Abernathy, Mack	Male	50...	3. High Sc...	1	Medical/Professi...	Republican	Community Minded	Health	Likley	Extremely L...	Not Likely	Moderate User
94,171	Abou-Sayf, Henry	Male	60...	3. High Sc...	1	Clerical/White C...	Republican	Solid Prestige	Health	Likley	Extremely L...	Not Likely	Moderate User
78,579	Acabchuk, Mariana	Male	40...	3. High Sc...	2	Admin/Managerial	Independ...	Community Minded	Religious	Likley	Extremely L...	Not Likely	Admin/Manager.
80,136	Acabchuk, Reynaldo	Male	50...	2. Bachelors	0	Professional/Tec...	Democrat	Affluent Households	Charitable	Not Likely	Extremely L...	Extremely L...	Non-User
72,688	Adrianzen, Jeffery	Male	80+	1. Graduate	3	Homemaker	Independ...	Leisure Seekers	Children	Extremely L...	Likley	Not Likely	Passionate Infl...
45,006	Agrawal, Trey	Male	60...	-	-	-	-	-	-	-	-	-	-
66,904	Ahern, Edris	Female	50...	-	-	-	-	-	-	-	-	-	-
93,462	Ahmed, Jordan	Male	50...	3. High Sc...	1	Retired	Republican	Top Wealth	Political	Not Likely	Extremely L...	Likley	Light User
66,606	Abrams, Flavne	Male	60	1. Graduate	5	Sales/Service	No Party	Living Well	International Aid	Extremely L	Not Likely	Not Likely	Passionate Infl...

5. Leaky Bucket

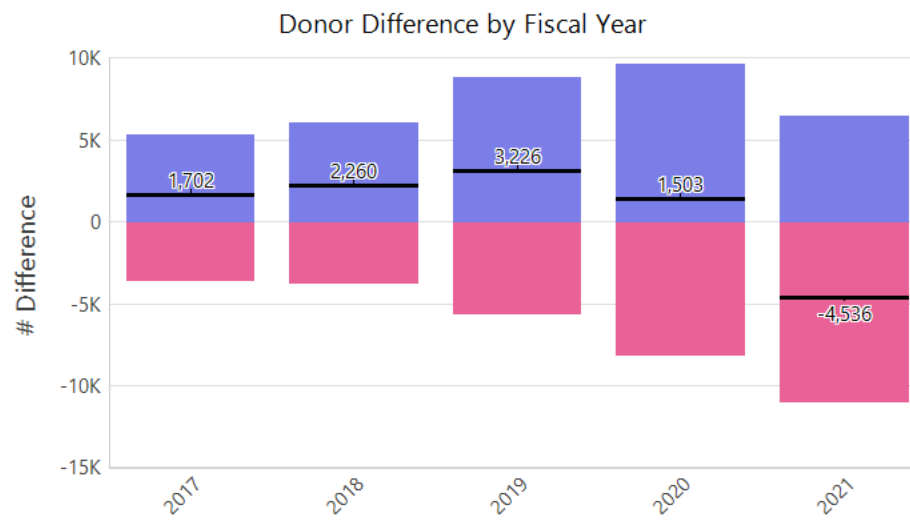
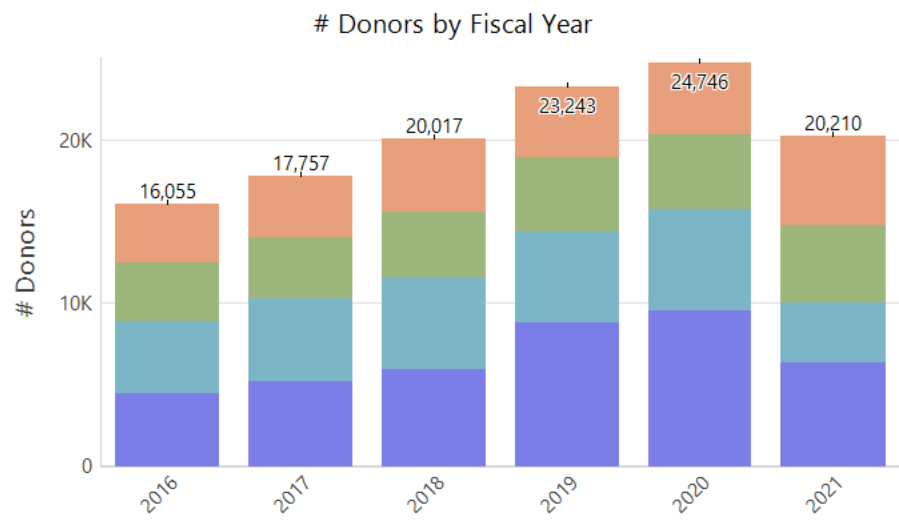
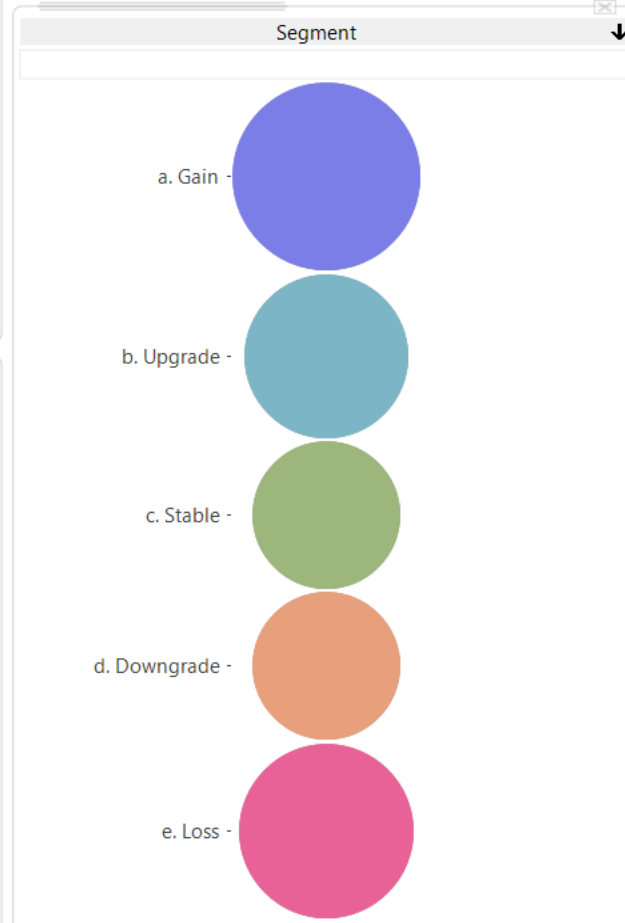


Leaky Bucket

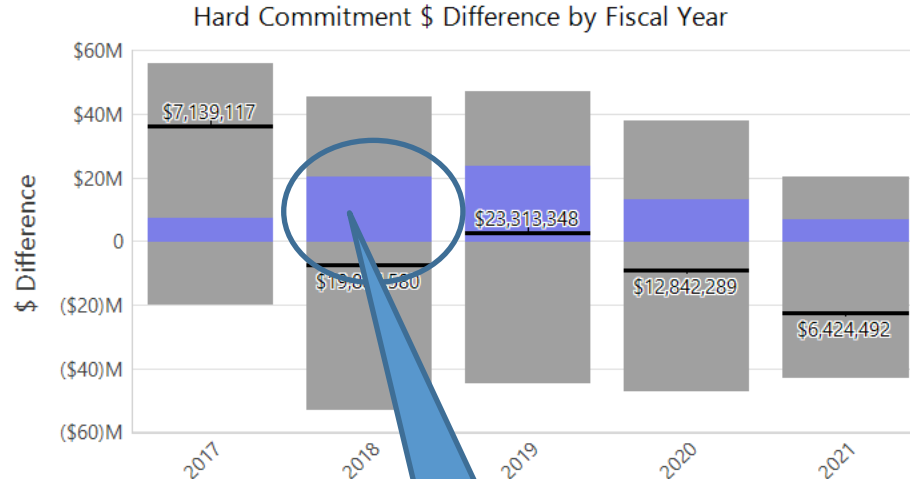
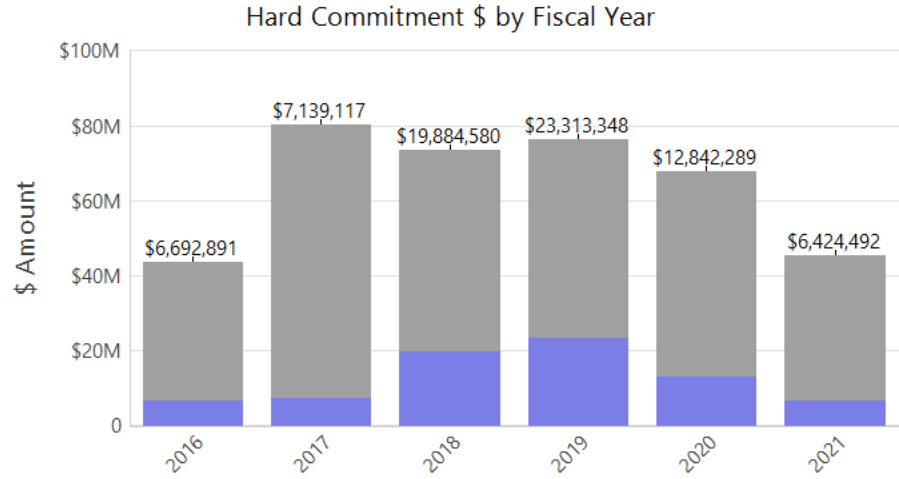


Constituents

Statistic	ID
Selected	90,930

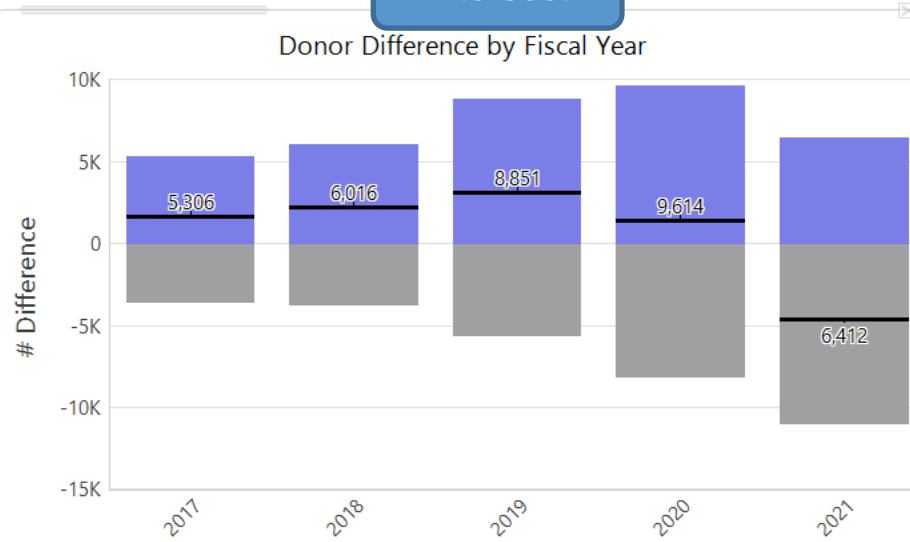
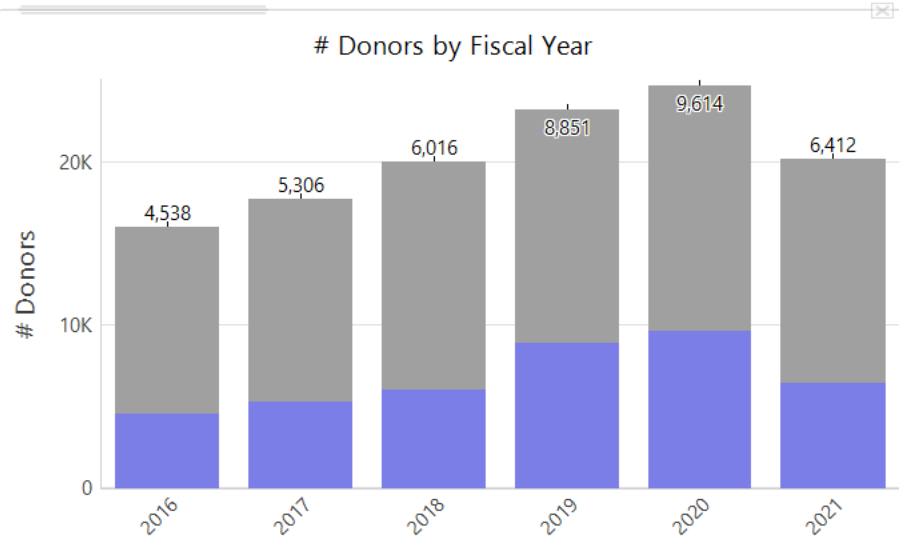
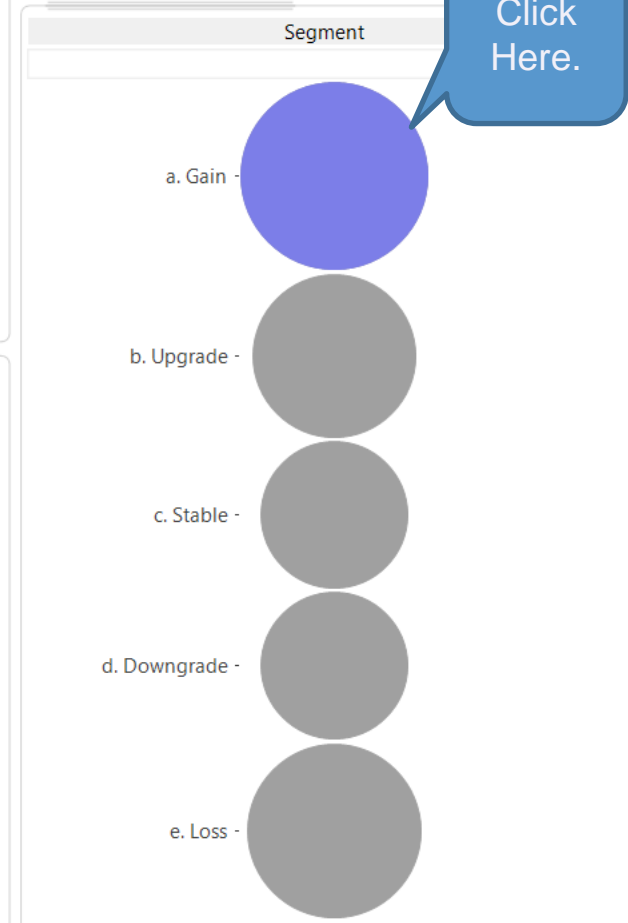


Gained in 2018



Constituents

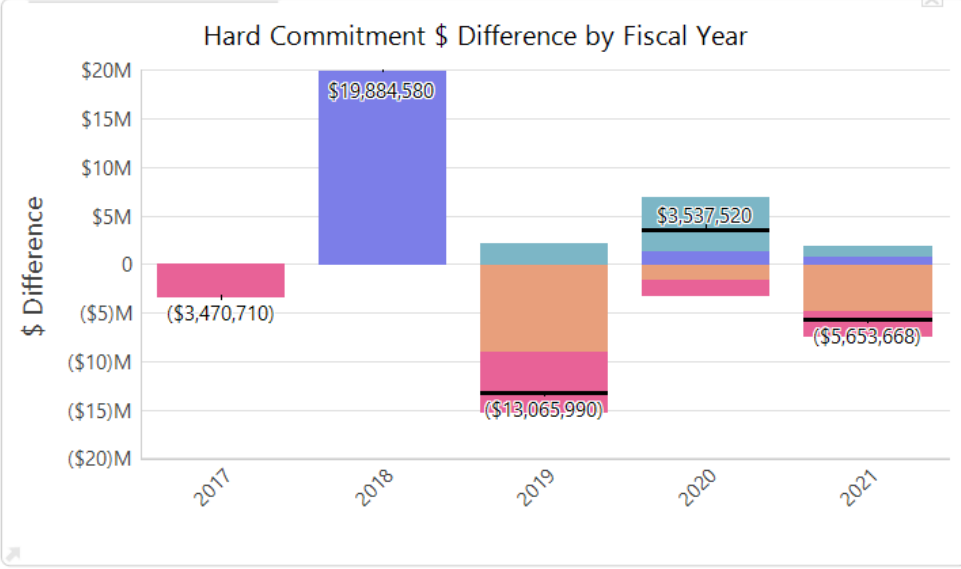
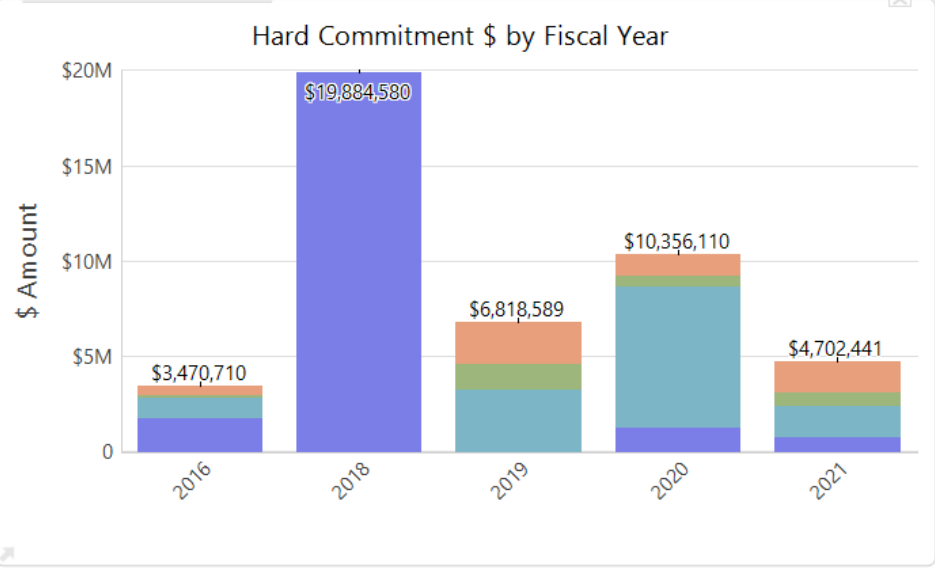
Statistic	ID
Selected	31,803



Intersect

Click Here.

Exclude Unselected

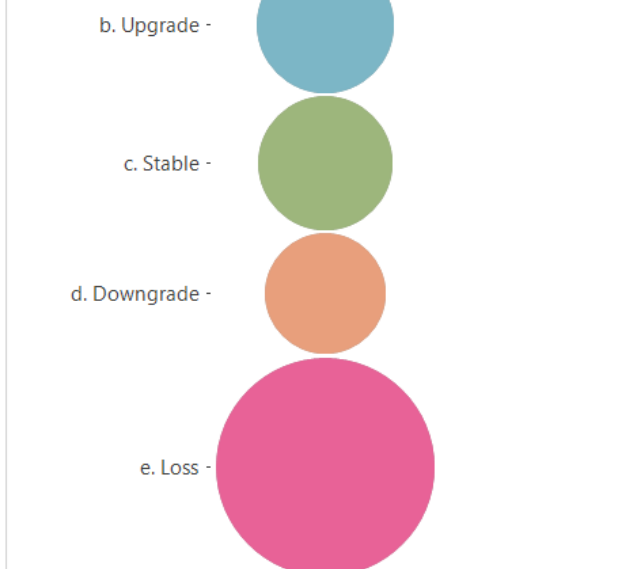
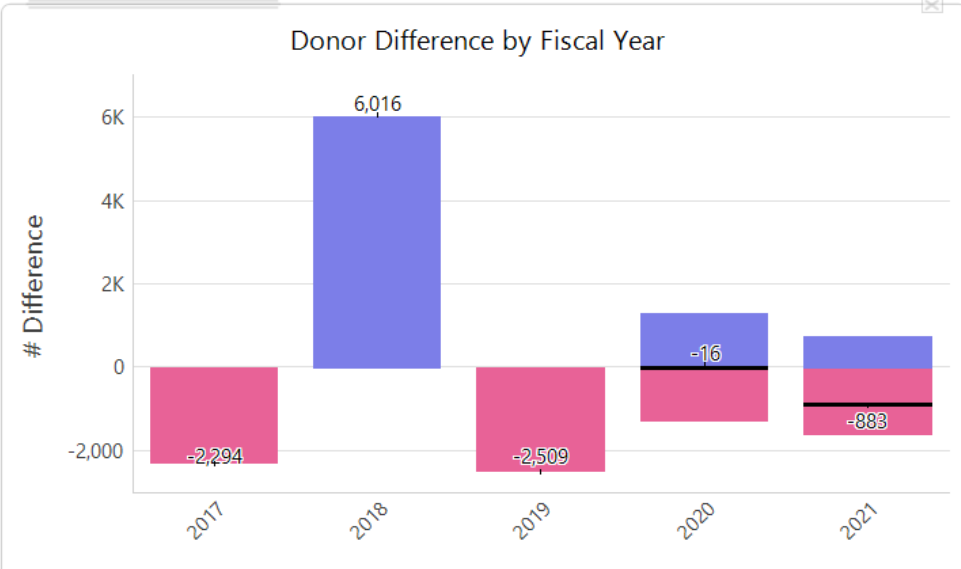
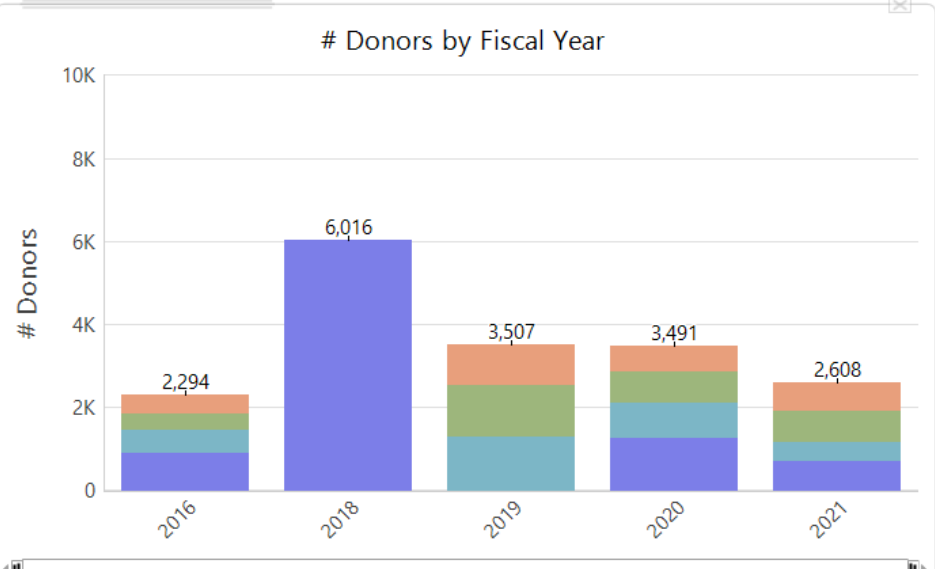


Constituents

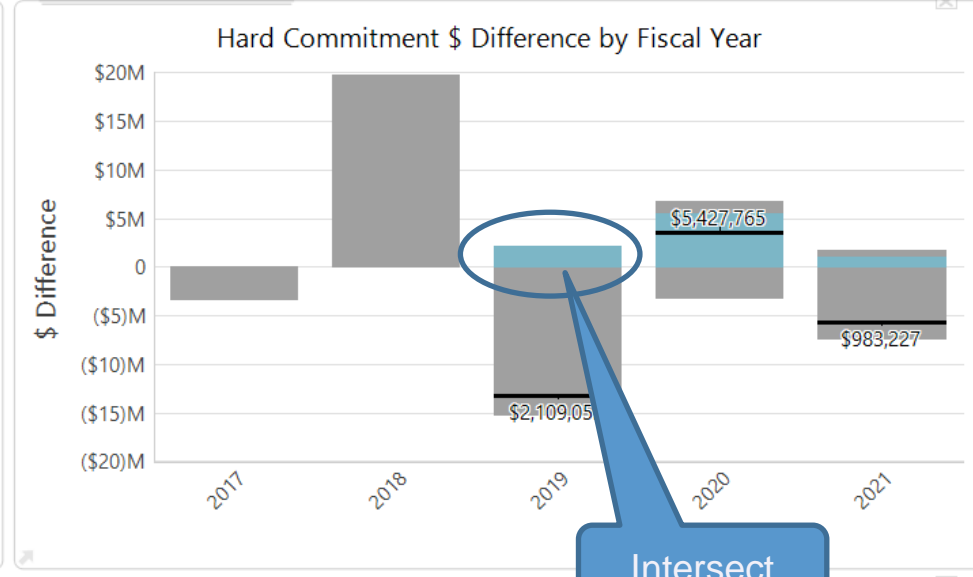
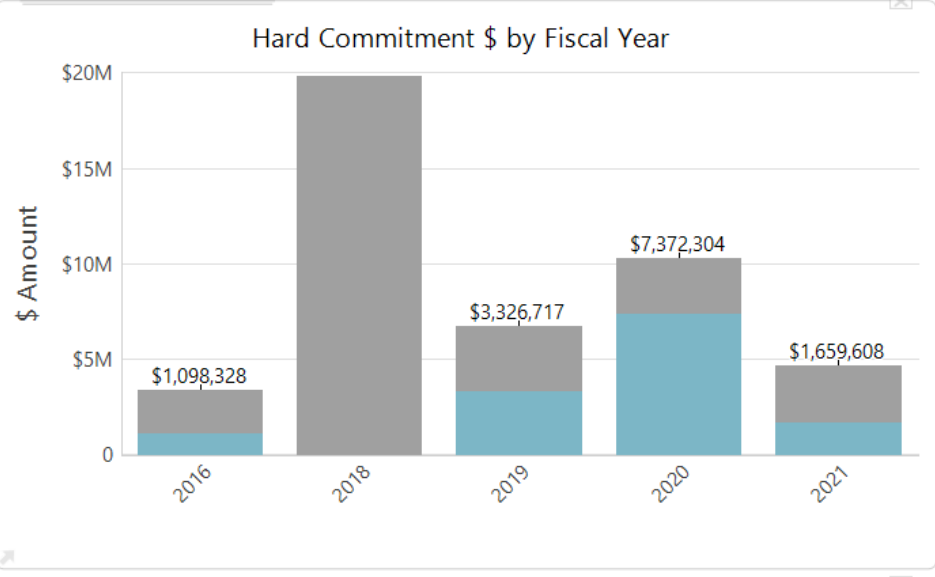
Statistic	ID
Selected	6,016

Segment

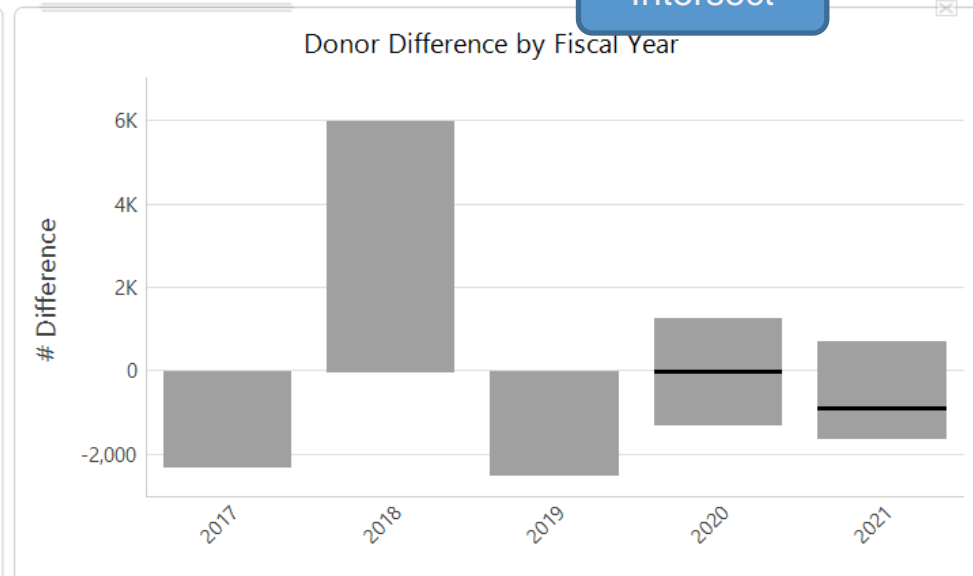
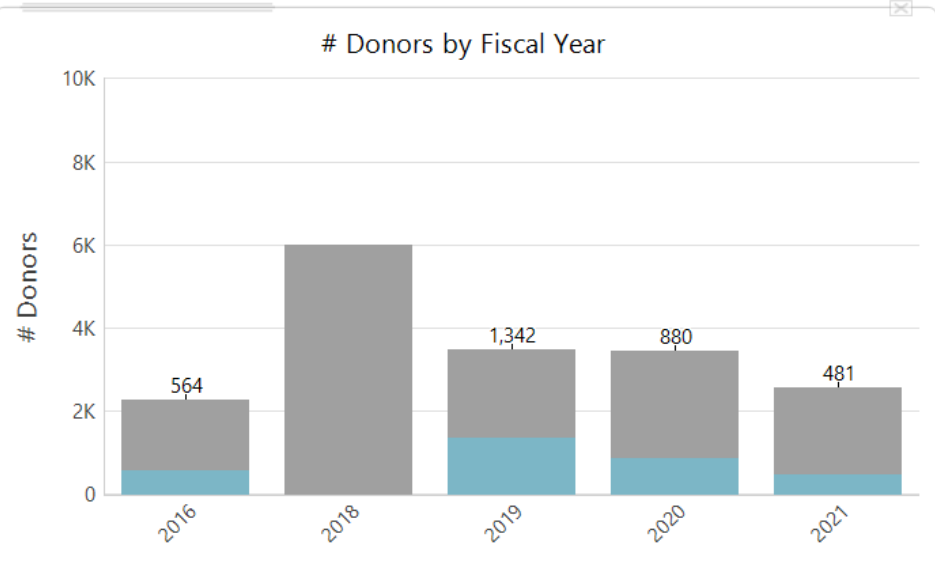
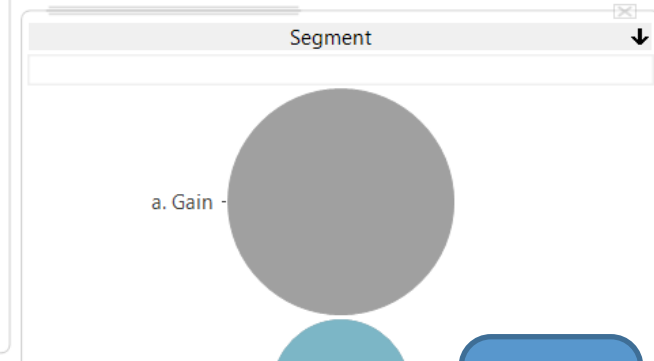
- a. Gain
- b. Upgrade
- c. Stable
- d. Downgrade
- e. Loss



Then Upgraded in 2019



# Constituents	
Statistic	ID
Selected	2,489

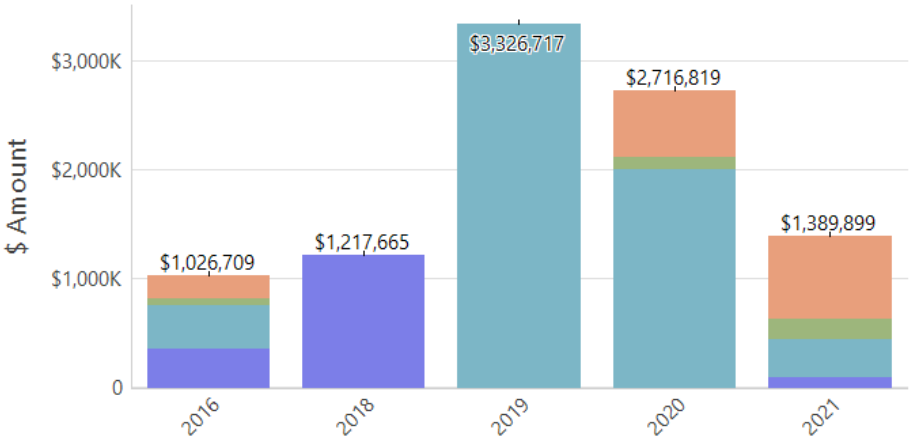


Intersect

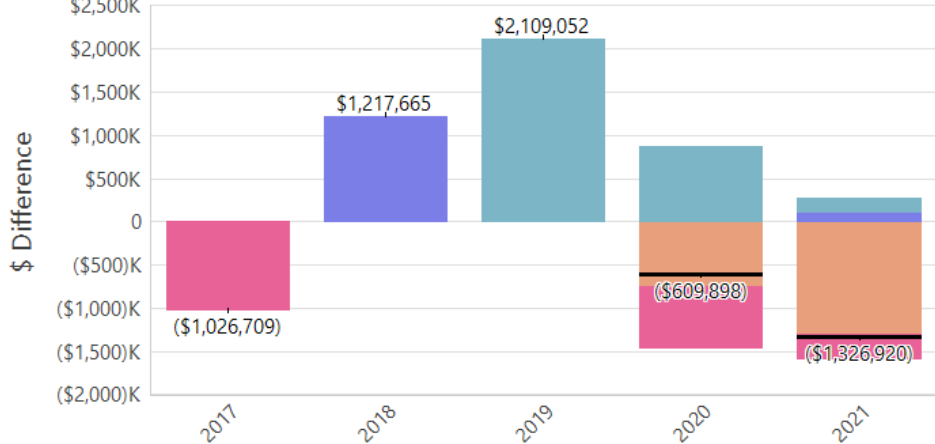
Click Here.

Exclude Unselected

Hard Commitment \$ by Fiscal Year



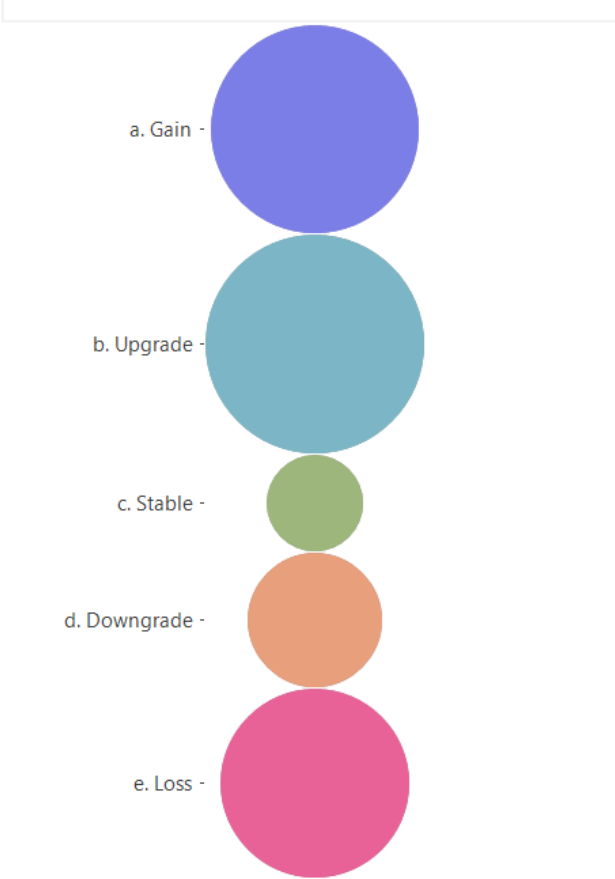
Hard Commitment \$ Difference by Fiscal Year



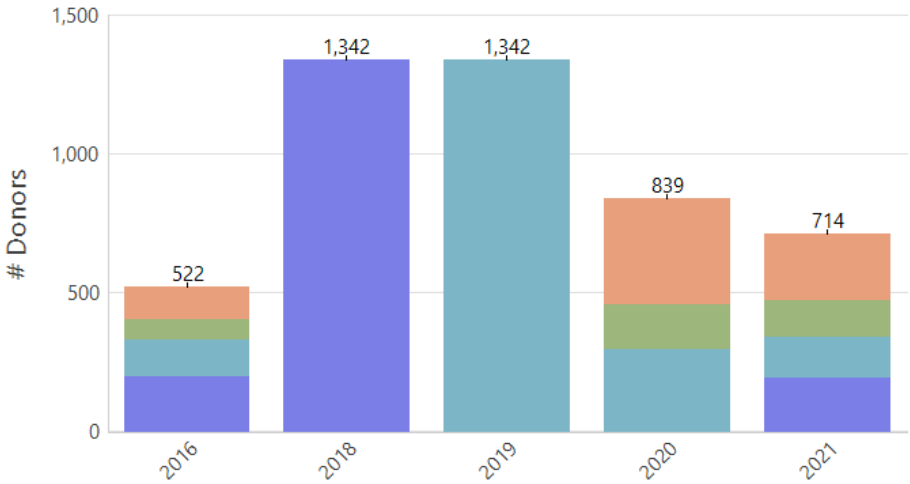
Constituents

Statistic	ID
Selected	1,342

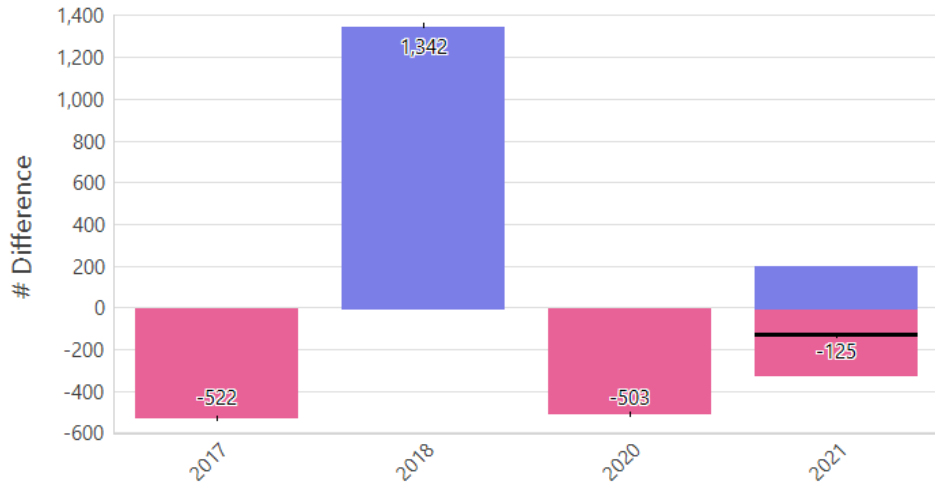
Segment



Donors by Fiscal Year

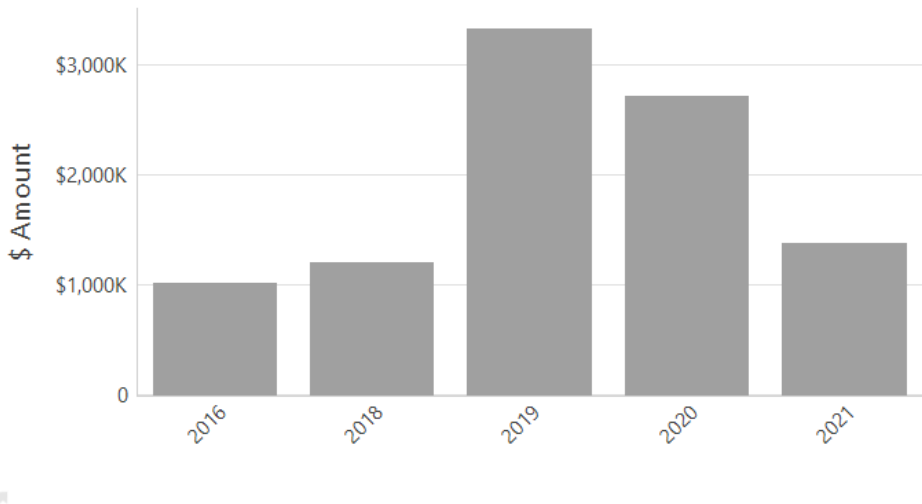


Donor Difference by Fiscal Year

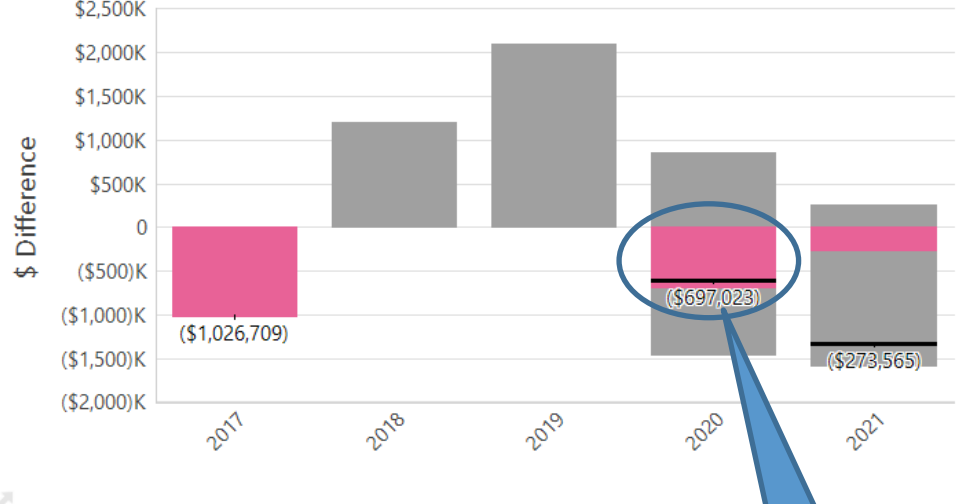


Then Lost in 2020

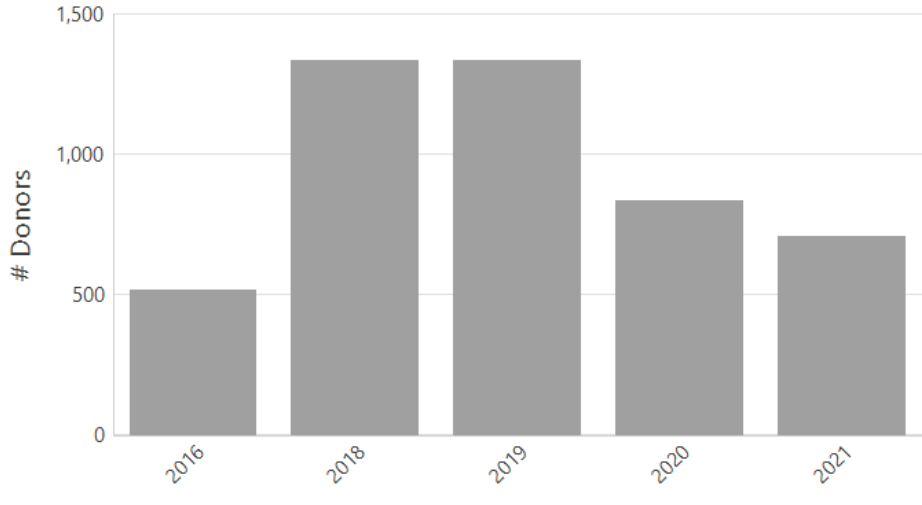
Hard Commitment \$ by Fiscal Year



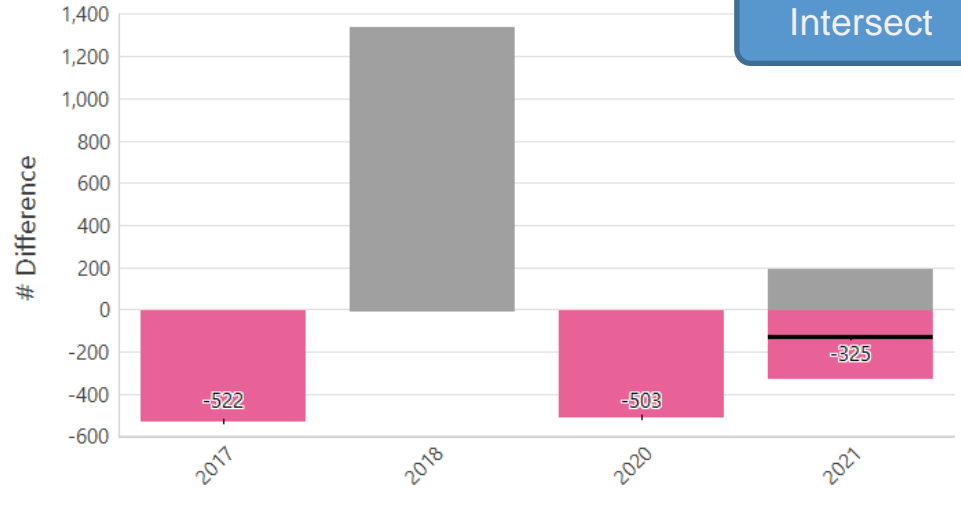
Hard Commitment \$ Difference by Fiscal Year



Donors by Fiscal Year



Donor Difference by Fiscal Year

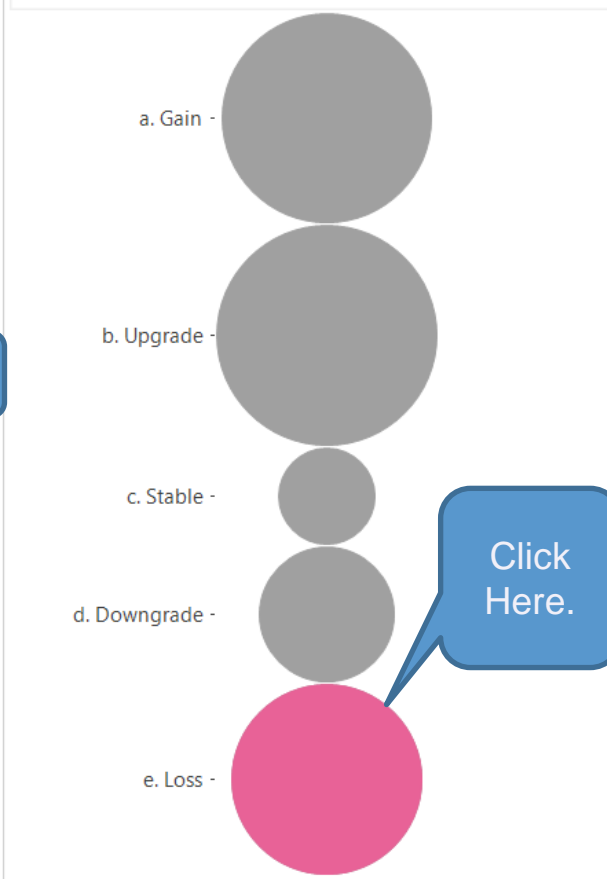


Intersect

Constituents

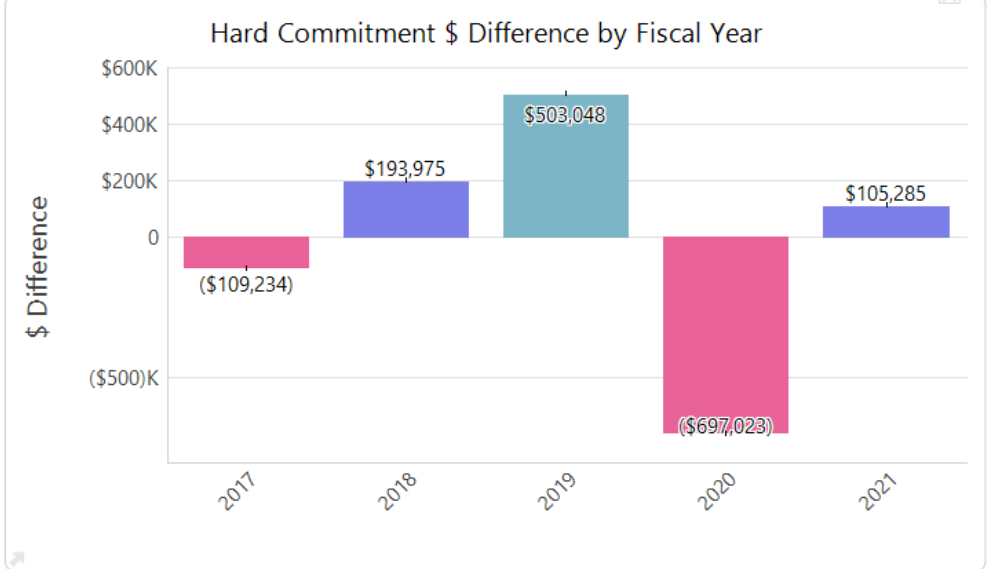
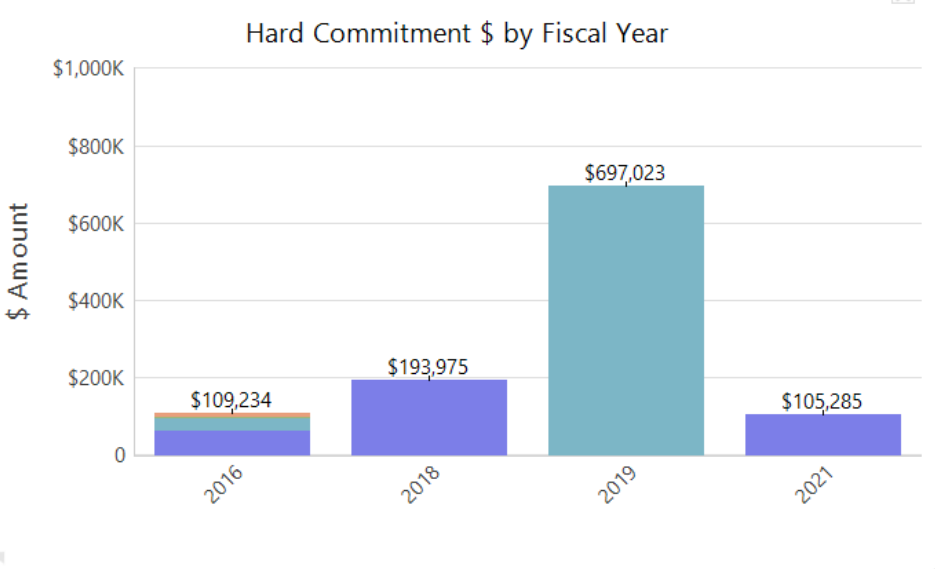
Statistic	ID
Selected	1,069

Segment



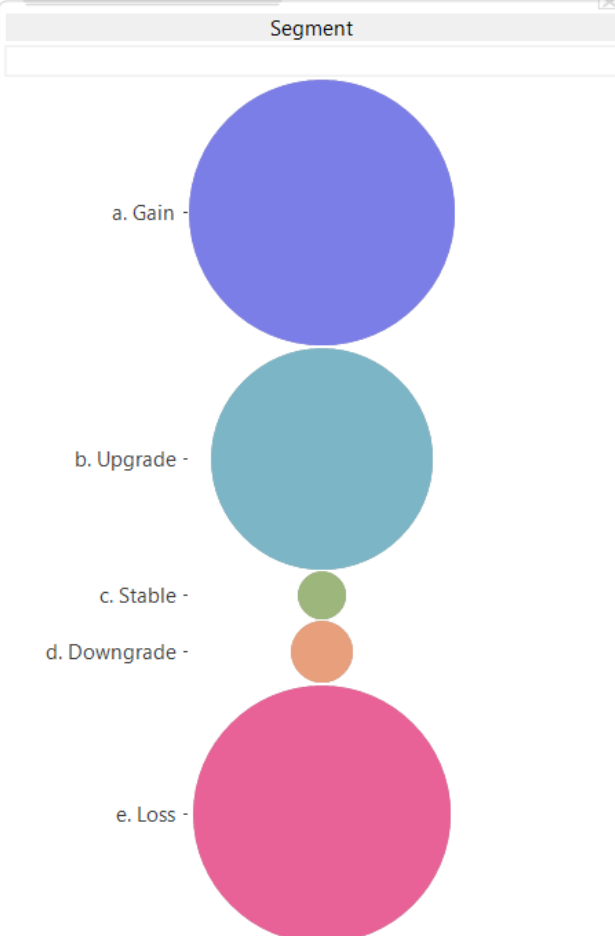
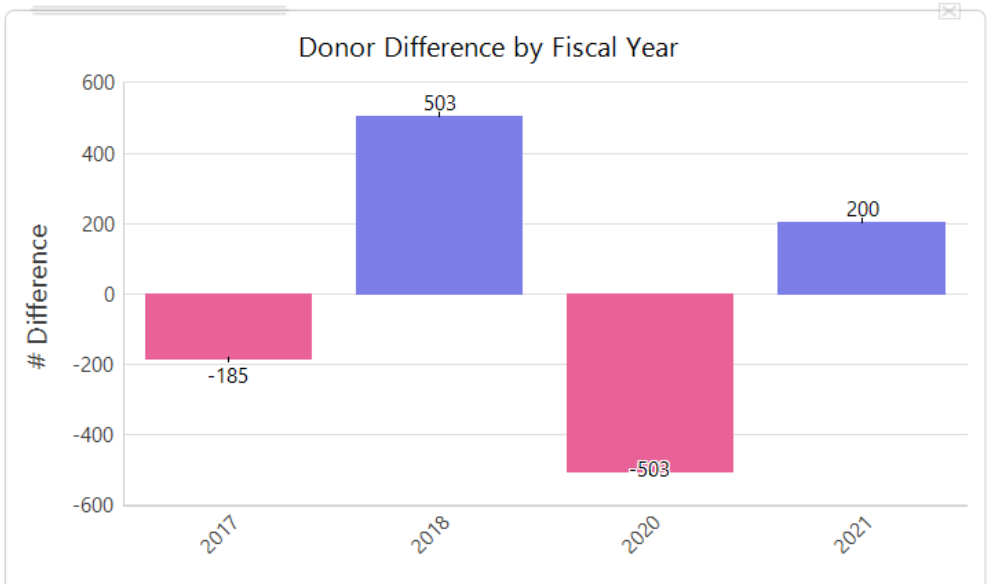
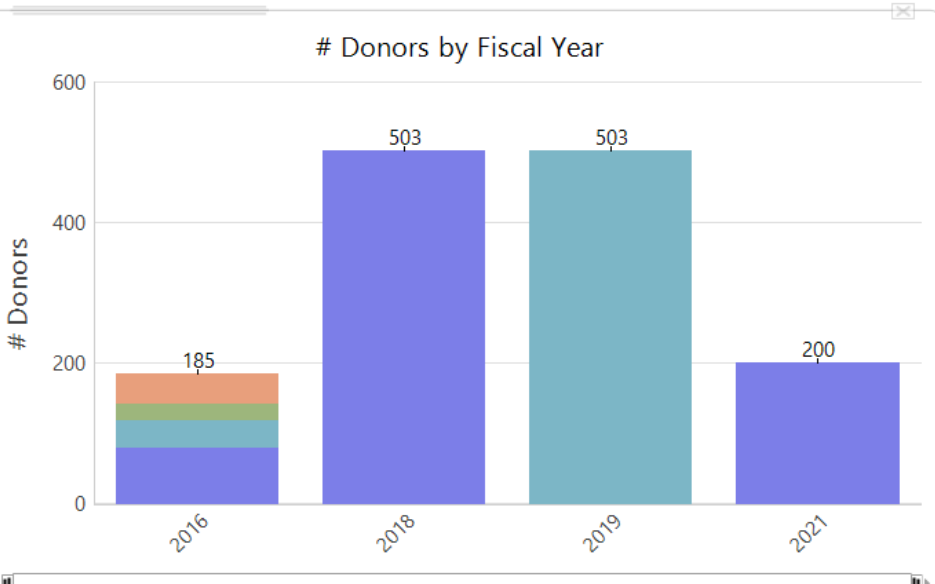
Click Here.

Exclude Unselected ... 503 people!!



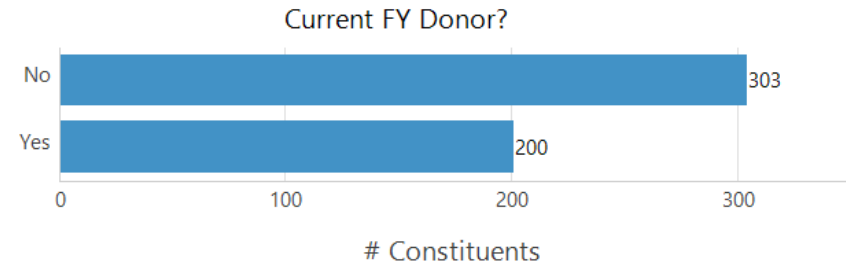
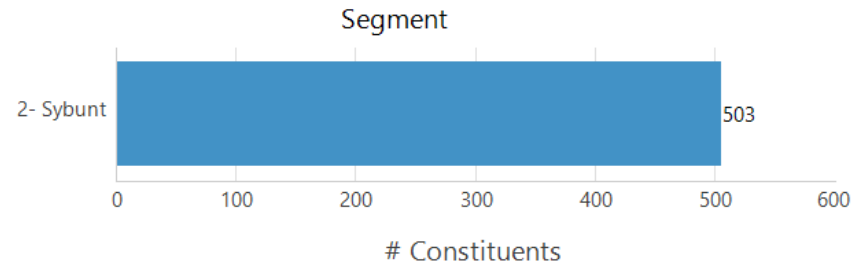
Constituents

Statistic	ID
Selected	503



Export List and Take Action.

Summary	Leaky Bucket	Participation	Giving History	Giving Funds	Gift Details	Constituent Giving	Appeal	Touchpoints	<u>Constituent List</u>	Map	Constituent Codes	Degrees	Bio	Filters
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Statistic	ID
Total Count	90,930
Selected	503
Unselected	
Excluded	90,427
Removed	2,813

Constituent List (Exportable)

ID	Name	Lifetime Total Co...	\$ AF CFY	\$ AF CFY-1	\$ AF CFY-2	\$ AF CFY-3	\$ AF CFY-4	\$ AF CFY-5	Class Year	Constituent C...	Assigned Fundraiser	City	State	Email	Phone
66741	Bowen, Eulah	\$391,046	\$100	\$0	\$450	\$300	\$0	\$150	1981	Spouse/Partner	-	Portola Valley	CA	email@example.com	(XXX)-XXX-XXXX
134197	Williams, Alfredo	\$359,121	\$0	\$0	\$107,082	\$100	\$0	\$0	1994	Parent	-	Houston	TX	email@example.com	(XXX)-XXX-XXXX
50259	Kudriashov, Tony	\$190,000	\$0	\$0	\$140,000	\$50,000	\$0	\$0	1969	Alumnus/a	-	Boca Raton	FL	email@example.com	(XXX)-XXX-XXXX
95956	Venedam, Dana	\$106,525	\$1,600	\$0	\$3,200	\$1,600	\$0	\$4,500	2001	Alumnus/a	-	New York	NY	email@example.com	(XXX)-XXX-XXXX
46035	Kelley, Beau	\$92,228	\$0	\$0	\$8,000	\$5,000	\$0	\$0	1966	Alumnus/a	-	New York	NY	email@example.com	(XXX)-XXX-XXXX
130958	Vacca, David	\$89,000	\$0	\$0	\$29,500	\$19,500	\$0	\$0	1994	Parent	-	West Hartford	CT	email@example.com	(XXX)-XXX-XXXX
44529	Miller, Cornelius	\$76,952	\$500	\$0	\$15,000	\$7,075	\$0	\$10,000	1965	Alumnus/a	-	New York	NY	email@example.com	(XXX)-XXX-XXXX
182234	Wakefield, Carolann	\$62,918	\$2,500	\$0	\$5,000	\$2,500	\$0	\$33,390	1954	Spouse/Partner	-	New York	NY	email@example.com	(XXX)-XXX-XXXX
42229	Kaiser, Clayton	\$60,529	\$5,000	\$0	\$55,504	\$25	\$0	\$0	1963	Alumnus/a	-	Alexandria	VA	email@example.com	(XXX)-XXX-XXXX
69212	Skidmore, Vance	\$54,820	\$0	\$0	\$50,000	\$220	\$0	\$3,000	1983	Alumnus/a	-	New York	NY	email@example.com	(XXX)-XXX-XXXX
82120	Grist, Georgann	\$49,450	\$1,600	\$0	\$1,600	\$1,500	\$0	\$3,000	1992	Spouse/Partner	Cosgrove, Jada	Minneapolis	MN	email@example.com	(XXX)-XXX-XXXX
47334	Skidmore, Stephen	\$45,500	\$0	\$0	\$5,000	\$1,000	\$0	\$5,000	1967	Alumnus/a	-	Santa Fe	NM	email@example.com	(XXX)-XXX-XXXX
44796	Phares, Ronald	\$42,000	\$10,000	\$0	\$22,000	\$10,000	\$0	\$0	1965	Alumnus/a	-	Wilton	CT	email@example.com	(XXX)-XXX-XXXX
32507	Riley, Brandy	\$35,500	\$0	\$0	\$5,000	\$3,000	\$0	\$0	1955	Spouse/Partner	-	York	PA	email@example.com	(XXX)-XXX-XXXX
199062	Hodges, Alec	\$34,825	\$5,000	\$0	\$15,000	\$5,300	\$0	\$3,150	-	Faculty/Staff	-	Manchester	NH	email@example.com	(XXX)-XXX-XXXX
46557	Costello, Armando	\$30,375	\$5,000	\$0	\$5,050	\$5,000	\$0	\$10,000	1966	Alumnus/a	-	Miami Beach	FL	email@example.com	(XXX)-XXX-XXXX
134786	Bulger, Junior	\$24,502	\$7,001	\$0	\$7,001	\$7,000	\$0	\$0	1985	Parent	-	Houston	TX	email@example.com	(XXX)-XXX-XXXX
100567	Smith, Brandee	\$22,500	\$2,500	\$0	\$17,500	\$2,500	\$0	\$0	2004	Alumnus/a	-	Pacific Palisades	CA	email@example.com	(XXX)-XXX-XXXX
51056	Merkelo, Doug	\$21,473	\$405	\$0	\$20,963	\$105	\$0	\$0	1970	Alumnus/a	-	Denton	TX	email@example.com	(XXX)-XXX-XXXX
33169	Lee, Rey	\$20,955	\$75	\$0	\$550	\$300	\$0	\$0	1955	Alumnus/a	-	Villanova	PA	email@example.com	(XXX)-XXX-XXXX
56796	Leroux, Wendy	\$19,700	\$19,300	\$0	\$100	\$50	\$0	\$0	1974	Spouse/Partner	-	Bethesda	MD	email@example.com	(XXX)-XXX-XXXX
41435	Falkner, Donald	\$17,948	\$2,850	\$0	\$14,835	\$263	\$0	\$0	1962	Alumnus/a	-	Hartford	CT	email@example.com	(XXX)-XXX-XXXX
116240	Gillum, Ruth	\$16,726	\$0	\$0	\$9,814	\$6,912	\$0	\$0	2013	Parent	-	New York	NY	email@example.com	(XXX)-XXX-XXXX
162542	Filbin, Dario	\$15,105	\$50	\$0	\$100	\$50	\$0	\$0	-	Friend	-	Los Angeles	CA	email@example.com	(XXX)-XXX-XXXX

6. Project Variables (7.5)



Project Variables

- a. Project Variables: New interface in the project workshop to develop and save project variables. 3 types:
 - i. Project Variables. For example: Date of Last Data Load = “now data load” (constant from the project)
 - ii. User Inserted Constants. For example, Target Visits = 100 (type it in)
 - iii. Calculated Fields. Aka operations on a field resulting in a single value, such as sum, average, min, mx, etc. For example: # Visits last month = x * y * z; the value updates with removal, and selections / exclusions

- b. Allow use in Text Box:
 - i. Allow a variable to be inserted along with formatted text. This was a key requirement from the 2019 User Group ... a key dashboard capability in PowerBI/Tableau/etc. that we have been missing.
 - ii. Ensure that NowDataLoad can be one of those ... we need to let end-users know that data that the data was loaded and when

- c. Allow variables to be used to position Goal Lines on Bar & Line Charts:
 - i. Use to position goals lines on bar chart and line chart.
 - ii. Adjust interface so that the goal lines can't be dragged by the user
 - iii. Adjust plotting so that the default is to always show all of the goals lines (today default it to resize to plot the bars and the goals lines can end up “off the chart”)



Example

v7.5 Preview

The implementation of the project variables feature will start with the concept of a variable depicting the point in time that data was last loaded from it's source into the project, that being when an .adv project is loaded but not when an .advm is loaded.

Project variables will be displayed within the Project Workshop tree under a new Project node using a grid to display their various properties which include the name, data type and current value of each variable. Variables provided by the system, such as this one, will have a predefined name and data type (date in this case) and will not have the ability for the user to edit any of their properties.

The data loaded variable may be used within the content of the Text Box, entered with a format such as: **6/22/2020** and **5:26 PM** to display the date and/or time of the data load occurrence, in the layout format desired.

Formats will include the list provided by the system and will take into account the cultural specifics of display based on the settings of the rendering machine (server/desktop). The various display features of the Text Box may be used to present the text with additional display formatting such as font specifics and coloring.

Examples:

Selected Rows: 12623

Unselected Rows: 0

Excluded Rows: 10639

Revenue Sum: \$15,655,510.90

Average Margin: 3,366.807%

For table eFashion, the count of rows:

Displayed	Selected	Unselected	Excluded	Removed
23,262 *	12,623	0	10,639	1,883

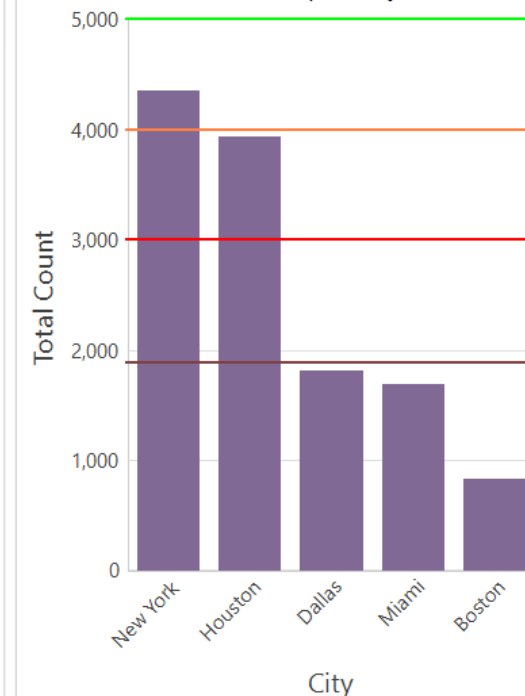
* The total number of rows in the table is equal to the Displayed plus the Removed rows.

State Filter

Restore Remove All

- California
- Colorado
- DC
- Florida
- Illinois
- Massachusetts
- New York
- Texas

Total Count per City



Click on New York, Text Updates!

v7.5 Preview

The implementation of the project variables feature will start with the concept of a variable depicting the point in time that data was last loaded from its source into the project, that being when an .adv project is loaded but not when an .advm is loaded.

Project variables will be displayed within the Project Workshop tree under a new Project node using a grid to display their various properties which include the name, data type and current value of each variable. Variables provided by the system, such as this one, will have a predefined name and data type (date in this case) and will not have the ability for the user to edit any of their properties.

The data loaded variable may be used within the content of the Text Box, entered with a format such as: **6/22/2020** and **5:26 PM** to display the date and/or time of the data load occurrence, in the layout format desired.

Formats will include the list provided by the system and will take into account the cultural specifics of display based on the settings of the rendering machine (server/desktop). The various display features of the Text Box may be used to present the text with additional display formatting such as font specifics and coloring.

Examples:

Selected Rows: 4359
Unselected Rows: 8264
Excluded Rows: 10639

Revenue Sum: \$6,668,461.30

Average Margin: 3,194.784%

For table eFashion, the count of rows:

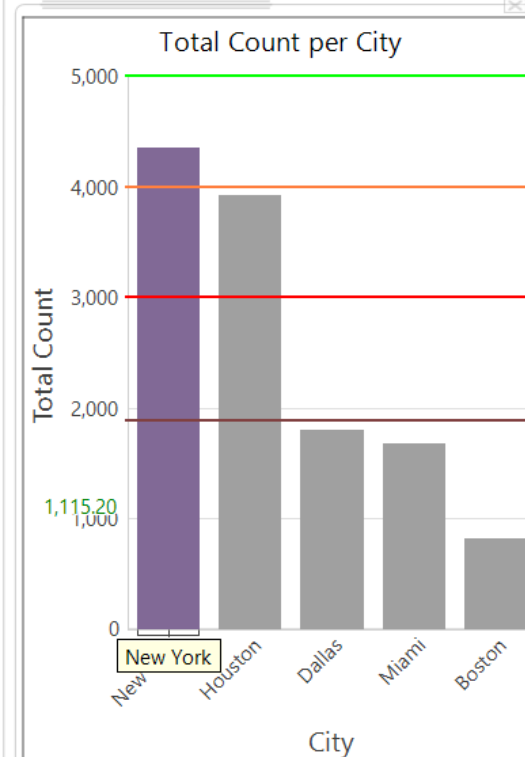
Displayed	Selected	Unselected	Excluded	Removed
23,262 *	4,359	8,264	10,639	1,883

* The total number of rows in the table is equal to the Displayed plus the Removed rows.

State Filter

Restore Remove All

- California
- Colorado
- DC
- Florida
- Illinois
- Massachusetts
- New York
- Texas



Goal Lines

v7.5 Preview



Edit Goals

Goal Lines:

- Removed (RemovedRows)
- Low (Cost Of Goods)
- Medium (Minimal Sales)
- High (Sales Goal)

Goal Name: (alphabetic, with no spaces)
High

Goal Value
Enter Value: 5000
Select Variable: Sales Goal

Color: ————— ...

Display This Goal

Add Goal Delete Goal

OK Cancel

Number of removed rows:
1,883

State Filter

- Restore Remove All
- California
- Colorado
- DC
- Florida
- Illinois
- Massachusetts
- New York
- Texas

Goal Lines Set to a Variable Will Adjust



Setting Variables

Project Workshop v7.5 Preview



> Project > Variables >

- Project
 - Tables
 - Pages
 - Color
 - Calculations
 - Variables
 - Average Margin
 - Cost Of Goods
 - DataLoaded
 - ExcludedRows
 - Minimal Sales
 - ProjectSaved
 - RemovedRows
 - Sales Goal
 - SelectedRows
 - SumSelected(Revenue)
 - TotalRows
 - UnselectedRows
 - Cross Table Links
 - Data Hierarchies
 - Generated Date Fields
 - Data Sources
 - Application

Variables

Properties

Statistics

Variables:

Tasks

[Create](#) a new variable

Variables

Modify	Delete	Name	Data Type	Value
		ProjectSaved	Date	8/6/2020 2:24:34 PM
		DataLoaded	Date	6/22/2020 5:26:42 PM
Modify	Delete	Cost Of Goods	Real	3000
Modify	Delete	Sales Goal	Real	5000
Modify	Delete	Minimal Sales	Real	4000
Modify	Delete	SelectedRows	Integer	Count of Selected rows for table: 'eFashion'
Modify	Delete	UnselectedRows	Integer	Count of Unselected rows for table: 'eFashion'
Modify	Delete	ExcludedRows	Integer	Count of Excluded rows for table: 'eFashion'
Modify	Delete	SumSelected(Revenue)	Real	Sum of Selected rows for field: 'eFashion/Sales Revenue'
Modify	Delete	TotalRows	Integer	Count of All rows for table: 'eFashion'
Modify	Delete	RemovedRows	Integer	Count of Removed rows for table: 'eFashion'
Modify	Delete	Average Margin	Real	Average of Selected rows for field: 'eFashion/%Margin'

Examples

Variable Definition [X]

Name:

Source:

Data Type:

Value:

Expression: Table:

Scope:

Field:

Operation:

Variable Definition [X]

Name:

Source:

Data Type:

Value:

Expression: Table:

Scope:

Field:

Operation:

Variable Definition [X]

Name:

Source:

Data Type:

Value:

Expression: Table:

Scope:

Field:

Operation:

Variable Definition [X]

Name:

Source:

Data Type:

Value:

Expression: Table:

Scope:

Field:

Operation:



Capabilities – Still Evolving

Scope:

- All Rows
- Selected Rows
- Unselected Rows
- Excluded Rows
- Removed Rows

Operatons:

- Count
- Unique Count
- Average
- Median
- Mode
- Minimum
- Maximum
- Ratio
- Sum



7. Unique Counts in Summary Sheet (7.5)



Unique Counts in Summary Sheet

Data Configuration

Data Table: Affiliation

Primary Field:

Summary Fields:

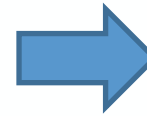
Selected	Field Name	Calculation	Denominator
<input type="checkbox"/>	<count>	Count	
<input type="checkbox"/>	Affiliation Record T	Unique Count	
<input type="checkbox"/>	Affiliation School	Unique Count	
<input type="checkbox"/>	Affiliation Year	Sum	
<input type="checkbox"/>	Affiliation_Record_	Sum	
<input type="checkbox"/>	Class Decade	Sum	
<input checked="" type="checkbox"/>	ID	Sum	

Average
Count
Cumulative Count
Cumulative Sum
Percent
Ratio
Sum
Unique Count

Check All

Uncheck All

OK Cancel



Giving by College

College Code	# Donors	\$\$
OVERALL	48067	\$1,064,576,051
A	12841	\$168,932,937
B	3607	\$42,627,586
C	26095	\$277,967,581
G	343	\$1,256,753
L	4070	\$47,838,857
M	15266	\$433,136,085
N	15	\$1,208,284
R	1869	\$19,785,122
U	1203	\$538,086
V	1574	\$24,018,098
W	6901	\$9,701,897
Y	2946	\$37,120,512
Z	150	\$444,254



Summary and Q&A

1. Architecture Update.
2. Analysis Filters.
3. Segment Maps (big update in 7.5).
4. Data Appends.
5. Leaky Bucket.
6. Constants & Variables (7.5).
7. Unique Counts in Summary Sheet (7.5).



Other Resources

OTHER RESOURCES

Key Metrics in Major Giving

Key Metrics in Annual Giving

Creating a Culture of Analytics

How Many Prospects Should be Assigned to a MGO

Creating & Using Alumni & Patient Attachment Scores

Visit www.AdvizoSolutions.com/resources