

Primary Relationship Type Summary

The **Primary Relationship Type Summary** viewport displays dollar and donor performance by Primary Relationship Type over a five year period. All metrics are within the context of the selected school/unit giving designations, primary relationship types, measurement and time period.

Key Definitions:

- **Cash:** Includes gift and pledge payment transactions designated to annual giving. This reflects actual dollars received during the period and donors who paid during the period.
- **Commitment:** Includes gift and pledge transactions designated for annual giving. This reflects dollars generated/committed during the period, and donors who made any commitment during the period, whether or not they paid during the period.
- **Pledge:** Includes only pledge transactions designated for annual giving.
- **Primary Relationship Type:** The Primary Relationship Type associated with an entity. Some entities may have multiple relationship types (e.g. "Parent" and "Alumna"), but your institution chooses one Primary Relationship Type. Donations that could not be matched to an entity record or where the entity record does not have a relationship type are listed as "No Relationship Type".
- **Dollar Performance:** The total legal amount of annual giving transactions. This includes only transactions designated to one of the selected school/unit giving designations, and from entities with one of the Primary Relationship Types selected.
- **Donor Performance:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction) to annual giving. This includes only transactions designated to one of the selected school/unit giving designations, and from entities with one of the Primary Relationship Types selected.