

# Portfolio Giving Comparison by Officer

The [Portfolio Giving Comparison by Officer](#) viewport displays portfolio giving levels of all your **Permitted Officers**, that is, all officers that you have permission to view based on your user account settings. Your system administrator controls these permissions, and can make any necessary changes if some officers do not show up in your report.

The viewport allows you to compare the total **Commitments**, **Cash**, or **Annual Giving Cash** for each officer's assignments in the selected fiscal year.

The **Fiscal Year** can be changed using the drop down at the top of the tab. This drop down will reload all viewports in the tab with the selected fiscal year. You can also change the **Assignment Type** using the drop down in the upper-right of the viewport.

You can display portfolio giving either in terms of **dollars** or **donors** by switching the radio button at the top of the viewport. Clicking on any of the links in the table will bring up the list of donors that make up the results.

## Key Definitions Related to this Viewport:

- **Permitted Officers:** All officers that you have permission to view based on your user account settings. Your system administrator controls these permissions, and can make any necessary changes if some officers do not show up in your report.
- **Dollars:** The total legal amount of the transactions.
  - **Please Note:** FPM counts legal amounts (hard credit) when aggregating giving for multiple donors. On a donor's individual record, you can see the sum of that donor's credit amounts (soft credit); however, in reports like the Portfolio Giving Comparison by Officer that aggregate giving from multiple donors, FPM counts legal (hard credit) amounts to avoid double counting transactions from assigned spouses, etc. With this in mind, gifts from Donor Advised Funds (DAF) where individuals are soft credited can be difficult to report on the transaction level, and are not likely to be reflected in this report. As a best practice, FPM recommends using proposal reports such as Console > Officer Goals and Advancement > Executive Summary > Proposal Comparison by Officer to get a full picture of dollars raised through officer efforts, which would generally include DAF gifts and exclude transactions an assigned prospect happened to make without being prompted by officer solicitations.
- **Donors:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction). Donors are counted only in the first month they donated during the fiscal year.
- **Commitment:** Includes gift and pledge transactions. This reflects dollars generated / committed during the period, and donors who made some kind of commitment during the period, whether or not they paid during the period.
- **Cash:** Includes gift and pledge payment transactions. This reflects actual dollars received during the period, and donors that paid during the period.
- **Annual Giving Cash:** Includes gift and pledge payment transactions to annual giving. The annual giving includes whatever business rules your institution has determined for classifying transactions and annual giving transactions. This reflects actual annual giving dollars received during the period, and annual giving donors that paid during the period.