

Advancement Monthly Giving Summary

The **Monthly Giving Summary** viewport displays dollar and donor performance by month 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. This reflects actual dollars received during the period, and donors who paid during the period.
- **Commitment:** Includes gift and pledge transactions. 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.
- **Dollar Performance:** The total legal amount of the 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. Donors are counted in the first month they were credited (i.e. soft credit and hard credit) with a qualifying transaction, so they cannot be counted in more than one month in the same fiscal year period.
- **Donor Performance:** The number of unique entities with a donor qualifying transaction (donor indicator is set to true on the transaction). 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. Donors are counted only in the first month they donated during the year.