

Accessing Donor and Fund Balance Reports Online

To access donor reports, log into <https://coopstudies.araizeonline.com>. Use your coopstudies email address (first initial last name@coopstudies.org) as your username and the temporary password Test#2013.

When you first log on, you will arrive at the dashboard that may display notifications from Araize or things that are still in process. For the most part, the dashboard will not be of interest to you.

The first time you log in, **please change your password** to something that is easy for you to remember. Passwords must contain one capital letter, one small letter, one number and one special symbol such as a #, \$, or _.

To change your password, click on My Account in the header bar. Type your new password in the password change boxes.

Click Save to save the new password.

Click Close to return to the main dashboard.

On the right side of the blue header bar, there is a toggle just to the left of “FastFund Nonprofit Online” that allows you to choose between fundraising and accounting.

You will access your Fund Balance Report in Accounting.

You will access your Donor Report in Fundraising.

To access your Fund Balance Report

If the Toggle just to the left of “FastFund Nonprofit Online” does not say Accounting, **click on the down arrow and change it to Accounting.**

In the dark blue header bar, click on **Reports**.

In the left column, hover your cursor over Restricted Reports, then **click on Activity Report**.

Click on the drop down arrow next to Dates and **choose Fiscal YTD**. (If you choose dates other than the fiscal YTD, you will get a report but the numbers might not be accurate!)

Under report filter, **choose your name**.

Above the dates and to the right, you have a choice of HTML, PDF, XLS or CSV format.

Chose the format for your report and then click Generate Report. If you choose HTML, the report will open in a new screen. If you choose a different format, the report will download and you can open it using your standard procedure for opening reports.

To access your Donor Report

If the Toggle just to the left of “FastFund Nonprofit Online” does not say Fundraising **click on the down arrow and change it to Fundraising.**

Click on Reports in the center of the dark blue header.

In the left column **select Custom Queries and Reports.** You should see that you have two reports to view – a donor giving report and an anonymous gifts report. (For most people, the anonymous donor gifts report will be blank, but we provide that report just in case you receive anonymous gifts.) Once you generate one report, you will have to click on the custom reports tab to get back to the reports list and generate the other report.

Click on the magnifying glass in front of the report that you want to view. A new screen will pop up. You will have a choice to open the report as HTML, XLS, or CSV. Please select the download type you prefer. You will probably want a XLS or CSV that can be manipulated or uploaded into another database.

Click on Generate Report.

Right now, the report is set to report all giving since July 2012 so you can build a history.

After you have downloaded the report, **please click on Sign Out** in the header before closing your browser. We have paid for 15 simultaneous user licenses (which means that 15 people can be on Araize at the same time.) If you do not sign out when you are done, your access continues to stay open for 30 minutes and may prevent someone else from logging on. If you try to log on and receive a notice saying that you cannot log on now, please try again in 30 minutes. As we pay a fee for each simultaneous line, we would like to keep the number of lines to a minimum. To help us determine how many separate lines are needed, please send me an email if you have difficulty logging in and we will increase the number of simultaneous users if warranted.