Missionary Dashboard: My Projects

My Projects is for the missionaries who are managing specific P accounts. This allows you to view donations and expenses for the project. This page will not apply to everyone.

If there is a specific P account that you would like added to your My Projects list, please request this through your Regional Director.

Account

| Account	Select ⌄

Defaults to All/Select

Choose the dropdown to reveal your picklist that will include the projects assigned to you. If one of the accounts is not listed, then no donations have been received. Once a donation is received, it will automatically be added to your picklist.

Quick Totals

THIS MONTH	LAST MONTH	YEAR TO DATE
$6,126	$8,883	$15,009
48 transactions	68 transactions	116 transactions

Quick reference for total donations received for This Month, Last Month, and Year to Date for the selected Account. (Note: If no specific Account is selected, these totals will reflect the sum of all P accounts assigned to your dashboard.) Below each category is a hyperlink that directs you to the listing of transactions for the option chosen.

Net Increase/Decrease in Account Over Time
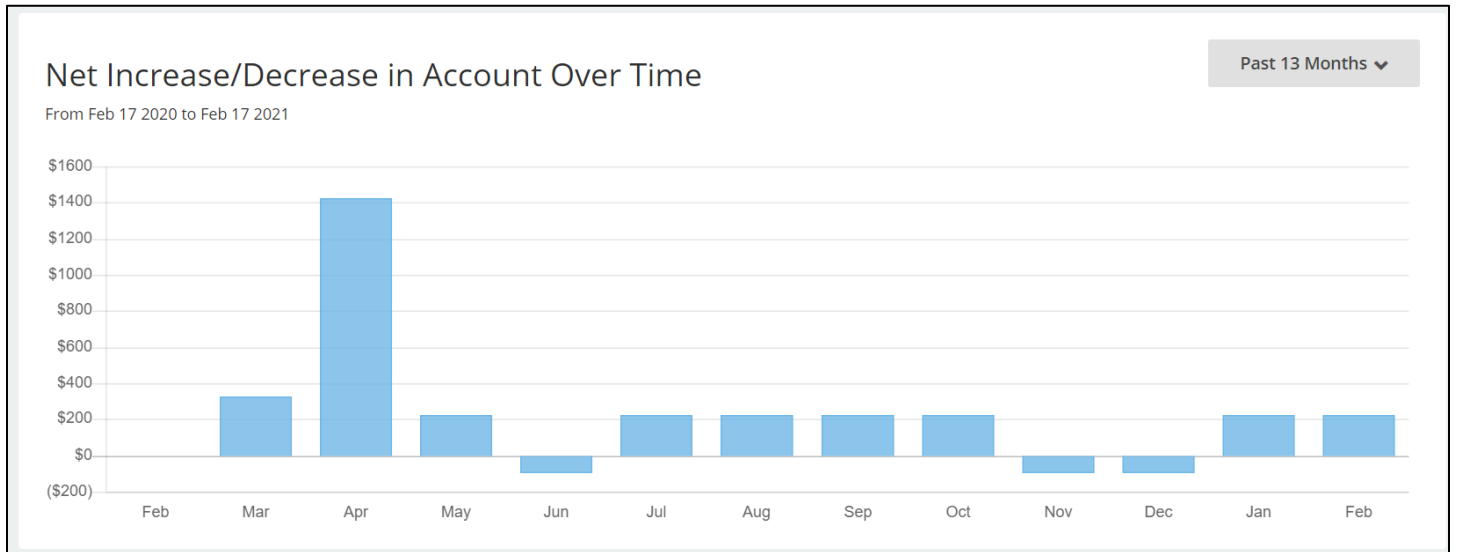
A bar graph that defaults to show the past 13 months of donor income.

Hover over each month to quickly review the total for the month, which calculates both income and expense transactions.

Click on a month to view the list of transactions, both income and expenses, under Recent Gifts.

Select the picklist on the upper right corner to change the date range as desired. The list of transactions under Recent Gifts will update accordingly.

Recent Gifts

Recent Gifts provides the transaction listing.

The green strip shows the chosen date range (either selected from the hyperlinks under the quick totals at the top of the page or from selecting a date range on the Account Over Time graph).

Sort By defaults to show the most recent donation first; however, by selecting the dropdown, you can arrange the data how you see it.

Select the black down arrow next to the donor's name to view more information. If you want to see as much information as possible without using the black dropdown, try adjusting the percentage of your screen's zoom.

Exporting / Contact Information
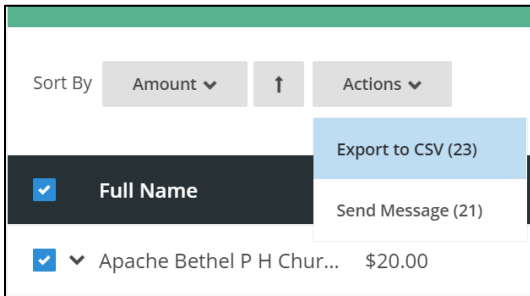
Select one, a few, or all to export to CSV (Excel).

(Note: to export all transactions to one document, make sure to change the **View** at the bottom of the page to show all lines. Then select all, choose Actions, and you should see the total number of transactions in parentheses. If you have more than 200 lines, you will have to export page 1, then proceed to page 2, and so on.)

Included on the exported excel document are the addresses, phone numbers, and email addresses for the donors, along with their donation information.