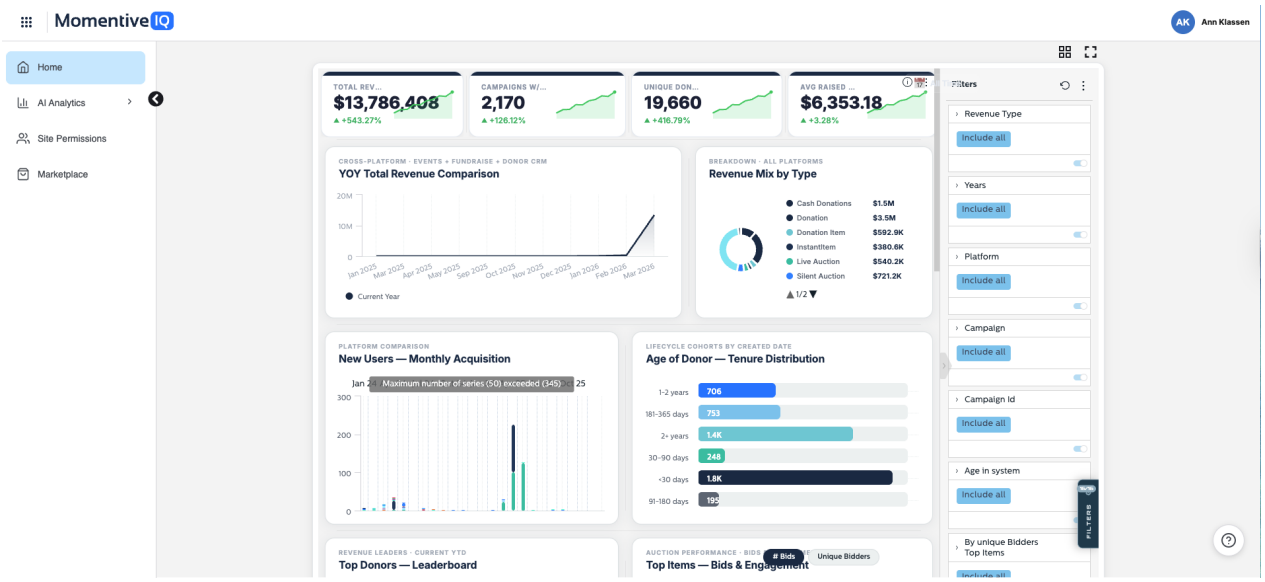
MomentiveIQ Dashboard

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Overview

MomentiveIQ Analytics is a reporting dashboard that provides clients with near real-time visibility into their fundraising performance across the GiveSmart platform. It consolidates key metrics from the GiveSmart Events and Fundraise modules into a unified, actionable view, helping organizations track revenue, monitor donor engagement, evaluate the effectiveness of fundraising activity, and make data-driven decisions to maximize their fundraising impact.



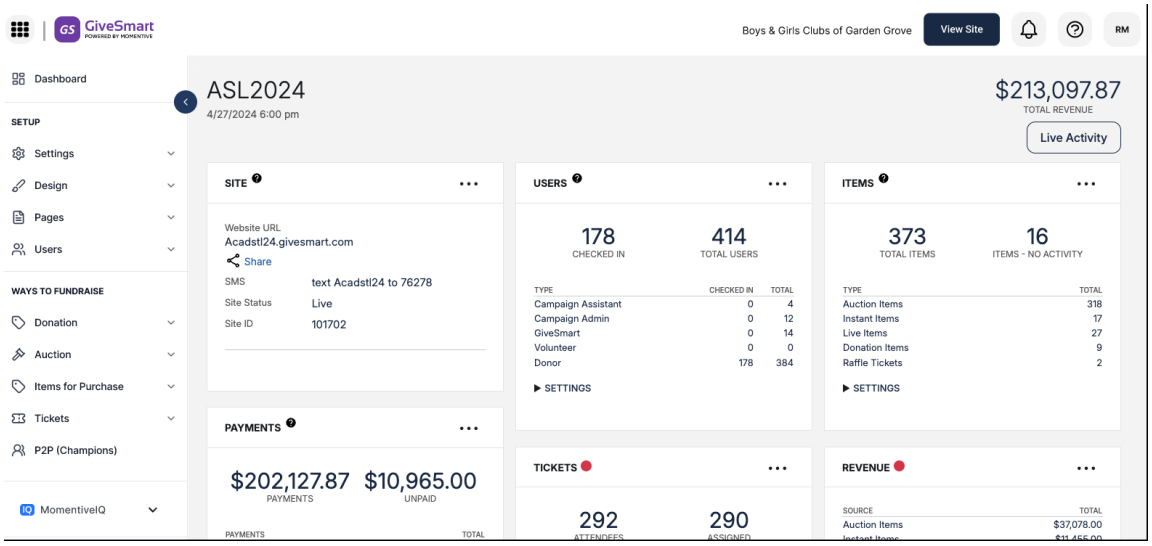
Accessing MomentiveIQ Analytics

Who Has Access

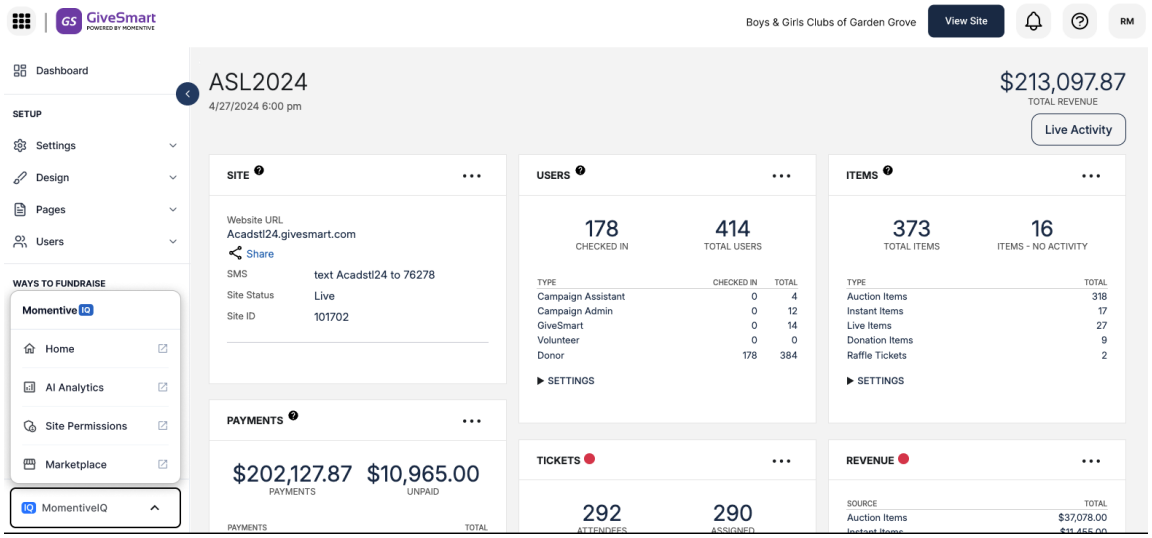
MomentiveIQ Analytics is available to administrators with Single Sign-On access via Momentive Identity. Any admin authenticated via Momentive Identity will automatically have access to MomentiveIQ Analytics. No additional provisioning or configuration is required.

How to Access MomentiveIQ Analytics

1. Log in to any GiveSmart module, Events, Fundraise, or Donor CRM, using your Momentive Identity credentials.
2. Locate the MomentiveIQ widget in the bottom left-hand navigation.



3. Click the widget to open the MomentiveIQ menu, which includes options for AI Analytics, Site Permissions, and Marketplace.



4. Select **AI Analytics** to launch your dashboard.

Using Filters in MomentiveIQ Analytics

MomentiveIQ Analytics lets you apply powerful filters to focus on the metrics and data most relevant to your goals.

What Filters are Available?

Filters let you narrow down report data by specific attributes such as transaction type, campaign details, bidding behavior, and timelines. Filters can be applied individually or in combination across the MomentiveIQ Core dashboard.

Available Filters

You can filter reports using the following dimensions:

Transaction & Revenue Filters

- **Revenue Type** (e.g., fundraising, auction, fixed-price)
- **Price**
- **Percentage of Fair Market Value (FMV)**

Time-Based Filters

- **Years**
- **Age in System** (time since campaign, bidder, or item was created)

Platform & Campaign Filters

- **Platform** (e.g., Events, Fundraise)
- **Campaign Name**
- **Campaign ID**

These filters help you analyze performance trends, bidder behavior, and revenue outcomes at a granular level.

Saving Filters as Your Default View

If you regularly use the same set of filters, you can save them as your default view.

To save a default filter view:

1. Apply your desired filters to the report.
2. Select **Save as Default** (or **Set as Default View**) from the report options.
3. Confirm the change.

Once saved, these filters will automatically load the next time you open the report.

> **Note:** Default views are user-specific and do not affect other users on your account.

Updating or Resetting Your Default Filters

- To **update** your default filters, apply new filters and save them again as default.
- To **reset** to the system default view, select **Reset Filters** or clear your saved default from the report settings.

Tips for Using Filters Effectively

- Combine **Campaign**, **Year**, and **Revenue Type** filters to compare performance across events.
- Filter by **Price**or **% of FMV** to evaluate auction efficiency and pricing strategy.
- Save different default views for different reports to support recurring analysis workflows.

Downloading MomentiveIQ Analytics Reports

You can download any MomentiveIQ Analytics report to share insights offline, use in presentations, or perform deeper analysis outside the platform. Downloads reflect the report

exactly as filtered at the time of export.

How to Download a Report

1. Open the **MomentiveIQ Analytics** report you want to export.
2. Apply any filters you want included in the download.
3. Locate the **Download** or **Export** option (top-right corner of the report).
4. Select your preferred file format.
5. The report will begin downloading automatically.

Widget Descriptions & Definitions

Total Revenue

Displays the cumulative fundraising revenue processed through GiveSmart for the current calendar year, encompassing all revenue generated across events, campaigns, and donations recorded since January 1 through the most recent data refresh. The accompanying year-over-year growth percentage provides immediate context on how current performance is trending against the same period last year, giving you a clear measure of fundraising momentum and a reliable benchmark for tracking progress toward your annual revenue goals.

Revenue Generating Activities

Displays the total number of currently active GiveSmart campaigns that have generated revenue through the most recent data refresh, paired with a year-over-year growth percentage comparing against the same period last year. This widget provides a quick pulse on campaign momentum, helping clients gauge how broadly their fundraising efforts are driving results and whether active campaign volume is growing relative to prior performance.

Unique Donors

Displays the total number of distinct donors who have contributed through GiveSmart since January 1 of the current year through the most recent data refresh. The accompanying year-over-year growth percentage shows how donor acquisition and retention are trending compared to the same period last year, helping clients evaluate the reach and effectiveness of their fundraising efforts.

- A unique donor is counted once regardless of how many transactions they have completed within the reporting period.

Average Raised per Revenue Generating Activity

Displays the average revenue generated per GiveSmart campaign for the current year, calculated by dividing total fundraising revenue by the number of campaigns with recorded revenue generated since January 1 through the most recent data refresh. The accompanying year-over-year growth percentage reveals how campaign performance is trending compared to the same period last year, offering a clear measure of fundraising efficiency and helping identify opportunities to maximize returns across your campaigns.

YOY Total Revenue Comparison

Provides a side-by-side comparison of total revenue generated across the GiveSmart Events and Fundraise modules for the current year versus the prior year. Each module's revenue is displayed individually, making it easy to identify which areas of your fundraising strategy are driving growth and where there may be opportunities for improvement. Use this widget to understand how revenue is distributed across your GiveSmart platform and track performance trends at the module level over time.

Revenue Mix by Type

Provides a detailed breakdown of fundraising revenue across the GiveSmart Events and Fundraise modules, segmented by revenue type — Donations, Tickets, Auction Items, and Items for Purchase. This widget offers a granular view of where your revenue is coming from, allowing you to see not only which modules are generating the most income but also which revenue streams are performing strongest within each. Use this insight to fine-tune your fundraising strategy, optimize high-performing channels, and identify untapped opportunities across your GiveSmart platform.

New Donors - Monthly Acquisition

Tracks the number of new users acquired each month by the GiveSmart campaign. This widget presents a month-over-month comparison, highlighting user growth trends within each campaign over time. Use this insight to evaluate the effectiveness of your outreach and onboarding efforts, identify seasonal patterns in user acquisition, and understand which campaigns are attracting the most new user engagement across GiveSmart .

Age of Donor - Tenure Distribution

Provides a comprehensive view of your donor base segmented by tenure, the length of time since each donor's first recorded contribution through today. This widget categorizes donors into meaningful tenure groups, from newly acquired first-time donors to long-standing lifetime supporters, displaying both the count and percentage within each segment. Use this insight to assess the health of your donor pipeline, measure how effectively you are attracting new donors while retaining loyal contributors, and identify opportunities to strengthen engagement strategies that turn first-time givers into lasting supporters of your mission.

- Tenure is measured from the date of a donor's first recorded contribution through today. Specific groupings (e.g., less than 1 year, 1–3 years, 3–5 years, 5+ years) are displayed within the widget.

Top Donors - Leaderboard

Displays a ranked view of the highest-contributing donors for the current year, showcasing the individuals or organizations that have generated the most fundraising revenue since January 1 through the most recent data refresh. This widget highlights the most impactful supporters at a glance for stewardship and relationship management purposes.

Silent Auction Performance - Bids & Engagement

Provides a detailed look at how auction items are performing, highlighting top items ranked by bid count and overall engagement. This widget surfaces the most sought-after offerings, giving clients a clear picture of what resonates with their audience and drives competitive bidding

activity.

FAQ: What data powers my MomentiveIQ Analytics dashboard?

What data is currently included in MomentiveIQ Analytics?
MomentiveIQ Analytics currently uses **GiveSmart Events** and **Fundraise**> data from **January 1, 2021 to present**, including **people records** and **settled transaction data**.

How often does the data refresh?

Data reflects the most recent refresh cycle. Reference the last updated timestamp on the dashboard for the exact refresh time.

Why don't I see some transactions reflected in Analytics?
Analytics currently includes **settled transactions only**. Pending, unpaid, or otherwise unsettled transactions are not included today.

Are bidding and unpaid cart activity included?
No. Unfulfilled bids and items in a participant's cart that have not been paid for are not currently reflected in Analytics.

> Future updates are expected to provide visibility into:
>
> - Unfulfilled bidding activity
> - Unpaid cart and purchase activity
> - Other fundraising engagement data not yet represented by settled transactions

Will CRM data be included in the future?
Yes. A planned enhancement will expand the dataset to include **people and transaction data from Donor CRM**.

How is the year-over-year growth percentage calculated?

The growth percentage compares the current YTD figure against the same date range from the prior year. For example, if today is March 15, the comparison reflects January 1 – March 15 of the current year versus January 1 – March 15 of last year.

How are donors ranked when they have the same donation amount?

When two or more donors have the same donation amount, the system uses an alphabetical tie-breaker to determine their ranking order.

> Alphabetical sorting is based on the donor's **full name**, which is constructed in the following order:
>
> - First Name
> - Middle Name
> - Last Name

Where will I see this ranking?

This applies anywhere donor rankings are displayed, such as:

- Leaderboards
- Donor recognition lists
- Reports

Can I customize the widgets or date ranges?

The widgets within the Analytics dashboard can not be customized. Filters can be applied to segment the data.

Can I create custom reports?

The Analytics dashboard provides a standardized set of pre-built widgets designed to surface the most impactful metrics.

- Advanced reporting options are available for purchase for organizations that need the flexibility to build tailored reports, create custom views, and explore their data in greater depth.

What's the difference between adding an admin in MomentiveIQ vs. Events or Fundraise?

The key difference comes down to **level of access and where the user needs to operate** :

- **MomentiveIQ (via Site Permissions)**
  → For users who only need access to **Analytics dashboards**

- **Events or Fundraise (via GS Fundraiser admin setup)**
  → For users who need **full platform access**, including:

  - Events
  - Fundraise
  - Application launcher
  - MomentiveIQ Analytics (via integrated permissions)

Will a GS Fundraiser admin automatically get access to MomentiveIQ?

Yes, **if Momentive Software permissions are included** during setup.

When adding a user via **GS Fundraiser**, you should:

- Ensure **Momentive Software permissions** are enabled
- This allows access to **MomentiveIQ Analytics** alongside Events and Fundraise