

# 5 Contact Reports you should know

# Overview

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As you start to work with your Contacts reports, think about the information you need, and why you need that information:

- Do you need to verify missing information
- Do you need to report on contacts that you have tagged in a certain way
- Do you wish to review relationships between contacts

If you know why you are generating a report, it is easier to decide on which report should be used

# Mechanics of Working with Reports

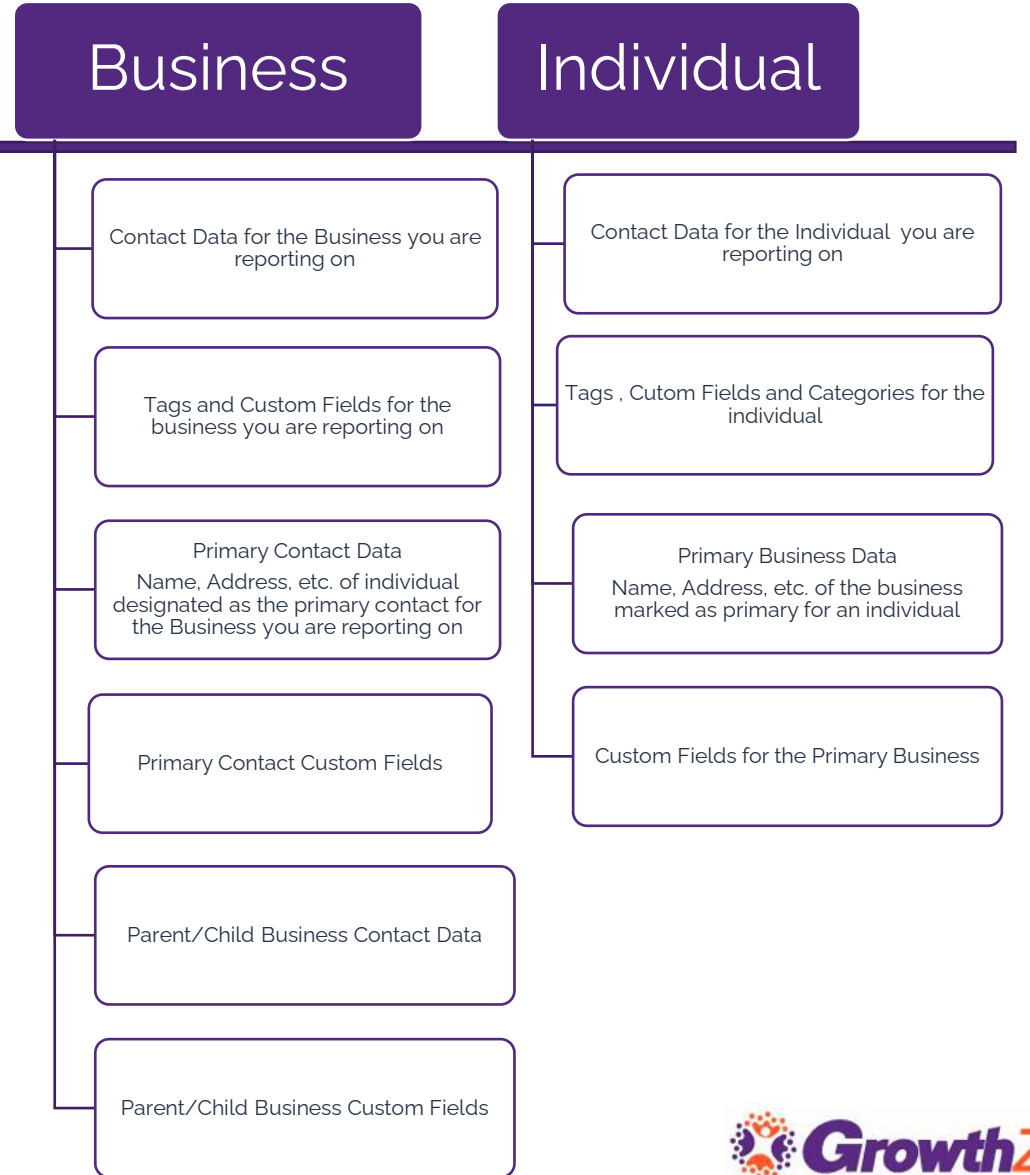
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Before you begin working with reports, you must understand the variety of ways you can manipulate the reports to achieve your goals

- ✓ Ability to select from pre-defined filtering options
- ✓ Ability to add your own Criteria/Filter options
- ✓ Ability to Summarize results
- ✓ Ability to add Additional Fields to Display
- ✓ Create a list/committee or dynamically populate a list/committee
- ✓ And... once you have designed your report to suit your needs, you can save it for future use!

# Reporting on Contacts

Generally, choosing the fields you wish to include in your report will depend on whether you are reporting on businesses or individuals



# 1...Contacts Report

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## Use Cases

- View all Organization Contacts & the Primary Contact info
- View Parent Organizations & Child Organizations
- View Organizations and their associated staff
- View Organizations that are missing Contact Info
- View Organization that have been tagged in some manner
- View Individuals & Primary Business
- Create a list of Contacts based on Status and Tags

KB: [Contacts Report](#)

# 1...Contacts Report

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Where is the information... any of the contact details you have entered on the **Profile** tab, as well as the **More Info** tab, will be available for reporting on the Contacts Report

# 1...Contacts Report

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## **Feed your Reports!**

- What information do you want to know about your contacts? Why they joined, whether they would like to volunteer, how they heard about you? All of these can be used as custom fields for your contacts, and are reportable in your Contacts Report KB: Custom Fields

# 1... Contacts Report

Use Case: I want to see all of the businesses in my association that have an active membership along with the primary representative for that business

- ✓ Important: Businesses will have a **Primary Contact Name** (which is the individual set as the primary for the business) and Individuals will have a **Primary Business** (which is the business marked as primary for the individual)

Contact Name ↕	Default Email ↕	Default Phone ↕	Primary Contact Name ↕
A Place for Dogs	info@mailiantor.com	(218) 786-0987	Pat White
A&E Systems Inc.	aesystems@mailinator.com	(217)345-5432	Cara Jones
AVO Insurance	benson@mailinator.com		Kenny Benson
Barry's Boats			Barry White
Bennie's Wine Shop	bennie@mailinator.com	(218) 345-1278	Bill Bennett
Bob's Builders	bb@mailinator.com		Bob The Builder



# 1... Contacts Report

Use Case: I want to see all of the active individuals in my system and their primary business contact details

- **What am I reporting on?** Individuals
- **What field(s) do I wish to display?** Primary Business fields

Contact Name ↕	Default Email ↕	Default Phone ↕	Primary/Contact Name ↕
Aiden Greene	aiden@mailinator.com	123-456-7890	The Knit Shop
Alex Wizard	Alexander.wizard@mailinator.com	(218) 123-8765	Wicks Candle Shop
Alicia Snow	snow@mailinator.com	(218) 234-8765	Snow Bound
Allison Greggs	allison@mailinator.com	(218) 123-1236	The Boutique
Allison Mays	allison@mailinator.com		
Andrea Yatker	yatker@mailinator.com	320-764-2906	Poire

# 1... Contacts Report

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Use Case: I want to see all Individuals that are active, their primary business and the business ownership (custom field) of those businesses

- **What am I reporting on?** Individual
- **What fields do I need?** Primary Business fields and Primary Contact Custom Fields – Number of Employees (related to the Primary Business)

# 1... Contacts Report

Use Case: I want to see all of the Businesses in my association that are active and have been tagged as “Not Engaged”

- **What am I reporting on?** Business
- **What field do I need to filter on?** Tag “Not Engaged”

Results: 7

Contact Name ↕	Default Email ↕	Default Phone ↕	Tags ↕	Organization Ownership ↕
Alex Wizard	alexander.wizard@mailinator.com	(218) 123-8765	Not engaged	
Alicia Snow	snow@mailinator.com	(218) 234-8765	Not engaged	
Billy West	bwest@mailinator.com	213-987-8765	Not engaged	
Cara Jones	carahonell@mailinator.com	(217) 123-1234	Not engaged	
Charlene Dockter			Not engaged	
Dana Dewey	dann@mailinator.com		Not engaged	
Terry Dockter			Not engaged	
<b>Count 7</b>				

# Bonus!!

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Another great addition with your GrowthZone software is the ability to AUTOMATICALLY populate your groups (referred to as Lists/Committees) with the results of your report

How does it work?

- Build out the desired report
- Create your list/committee
- Tie the report to the list/committee
- Nightly GrowthZone will generate your report, and populate the resulting contacts to your list

## 2...Contact Information Report

The Contact Information Report is focused on the Contact Information from the Profile tab and allows you to pull specific “type” of information

For Example: You would like a list of all staff and their personal email addresses

KB: [Contact Information Report](#)

Contact Id	First Name	Last Name	Contact Name	Contact Info	Email / Phone / Website	Contact Info Type	Internal Use Only	Validity Status	Do Not Contact	Only Transactional Emails
7493066	Alicia	Snow	Alicia Snow	snow@mailinator.com	Email	Personal	False	Verified	False	False
3275925	Danna	Macaroon	Danna Macaroon	dansa@mailinator.com	Email	Personal	False	Verified	False	False
6127148	Frances	Fay	Frances Fay	franny@mailinator.com	Email	Personal	False	Verified	False	True
2530774	Hally	Burns	Hally Burns	hally@mailintor.com	Email	Personal	False	Valid Syntax	False	False
5266010	Shelly	Satre	Shelly Satre	shelly.satre@gmail.com	Email	Personal	False	Verified	False	True
5284812	William	Horsin	William Horsin	william.horsin@mailinator.com	Email	Personal	False	Verified	False	False
Count 6										

## 2...Contact Information Report

**Use Case:** You need a list of your business primary contacts cellphone numbers

Contact Id	First Name	Last Name	Contact Name	Contact Info	Email / Phone / Website	Contact Info Type	Internal Use Only	Validity Status	Do Not Contact	Only Transactional Emails
3278123	Aiden	Greene	Aiden Greene	123-456-7890	Phone	Cell	False			
6646339	Alex	Wizard	Alex Wizard	(218) 123-8765	Phone	Cell	False			
8659423	Alexander	Wizard	Alexander Wizard	218-820-0038	Phone	Cell	False			
3932782	Andrea	Yatker	Andrea Yatker	320-764-2906	Phone	Cell	False			
8944071	Barb	Larson	Barb Larson	217-987-8765	Phone	Cell	False			

# 3...New Organization Contact Report

This report can provide you with a report of all active organizations and the staff associated to those memberships

KB: [New Organization Contact Report](#)

Results: 531

Page 1 of 6

Related Organization	Contact Name	Default Email ↕	Default Phone ↕	Membership Owner ↕
A Place for Dogs	Anna West			
	Betty Mason		(218) 786-0987	
	Cami Benson	cami@mailinator.com	218-123-4567	A Place for Dogs
	Cami Benson	cami@mailinator.com	218-123-4567	Deerwood Dog Training and Boarding
	Chris Test	chris.test@mailinator.com	218-820-4559	A Place for Dogs
	Clark Kent		543-456-2345	A Place for Dogs
	Connie Jones			
	Daniel Jackson	djackson@mailinator.com	(218) 786-0987	
	Frank Westing		(218) 786-0987	A Place for Dogs
	Gregory Jameson	jameson@mailinator.com	(218) 786-0987	
	Harry Danin	hdanin@mailiator.com	213-987-9876	
	Jenna Markson			A Place for Dogs

# 4...Directory Contact Report

The Directory Contact report can be used to ensure that all of your active contacts have directory listing information populated

KB: [Directory Contact Report](#)

Business Name	Description	Short Description	Keywords	Business Categories	Directory	Listing Level	Alternative Name	Directory Related Contacts
Wicks Candle Shop					Active Member Directory	Standard Listing		
Tott's Trucking					Active Member Directory	Deluxe Listing		Anna Amson
RANDY'S BUILDING SUPPLY					Active Member Directory	Deluxe Listing		BC Jones
Mara Furry				*Florists	Active Member Directory	Deluxe Listing		
Main West Realty					Active Member Directory	Standard Listing		



# 4...Directory Contact Report

Use Case: Identify members who do not have business categories

Business Name	Description	Short Description	Keywords	Business Categories	Directory	Listing Level	Alternative Name	Directory Related Contacts
Wicks Candle Shop					Active Member Directory	Standard Listing		
Tott's Trucking					Active Member Directory	Deluxe Listing		Anna Amson
RANDY'S BUILDING SUPPLY					Active Member Directory	Deluxe Listing		BC Jones
Main West Realty					Active Member Directory	Standard Listing		
Forsyth Realty					Active Member Directory	Deluxe Listing		Maria Loisu
Joe's Malt Shop					Active Member Directory	Super Deluxe - Org		

# 5...Invalid Email Addresses Report

The **Invalid Email Addresses Report** provides a list of all emails in your database that have been marked invalid.

KB: [Invalid Email Addresses Report](#)

Contact Name ↕	Email Address ↕	Validity Status ↕	Date Invalid ↕
Jackson Sandwiches	sandyjack@mailinator.com	Bad Domain	
John Jones	jj@mailinator.com	Bad Domain	
Susan Williams	swilliams@mailinator.com	Generic Bounce	1/23/2019
Sheryl Rassler	sheryl.rassler@growthzone.com	Generic Rejection	7/25/2022
Chamber Master	chamber_master@mailinator.com	Generic Bounce	9/28/2022
Deerwood Animal Shelter	deerwoodshelteradmin@mailinator.com	Generic Bounce	10/27/2022
Test User	test@mailinator.com	Generic Rejection	3/22/2023
A&E Systems Inc.	carahone@mailinator.com	Mailbox Not Found	5/9/2023
AE Systems Inc.	carahone@mailinator.com	Mailbox Not Found	5/9/2023
<b>Count 9</b>			

# Questions?