

# 5 Things you might not know...Reports

# Agenda

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## Fields to Display

- Select/Deselect Fields

- Reorder fields

## Additional Criteria

- Adding additional criteria fields

- How AND and OR work

## Exporting Reports: Detail vs Summary

## Saving/Favorite Reports

## Synchronize List to Report

# Example

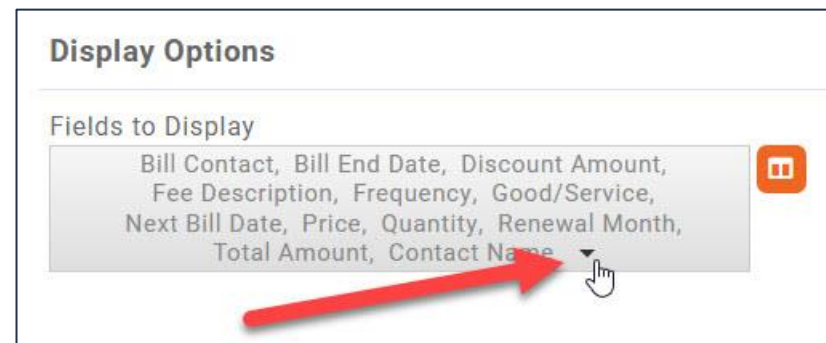
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I want to generate a report of my contacts that includes the following information:

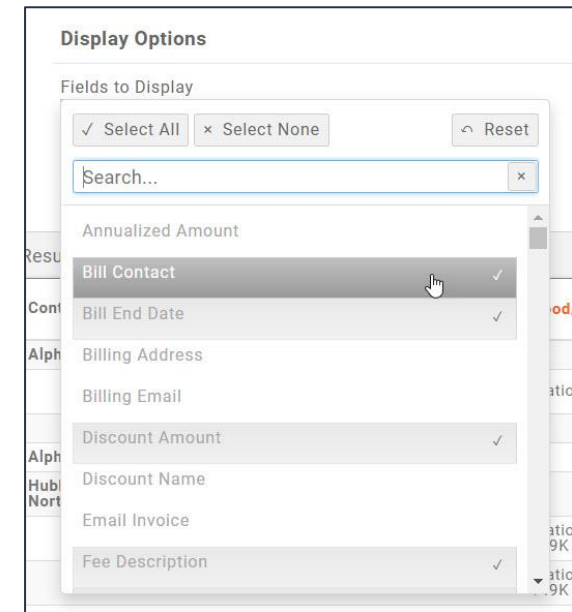
Org Name, Primary Contact, Primary Contact Email Address, Primary Contact Phone

# Fields to Display

Each report has a set of default fields. Clicking the down arrow in the Fields to Display dropdown will access all the fields that can be included in the report.



Click to select or deselect fields as needed.



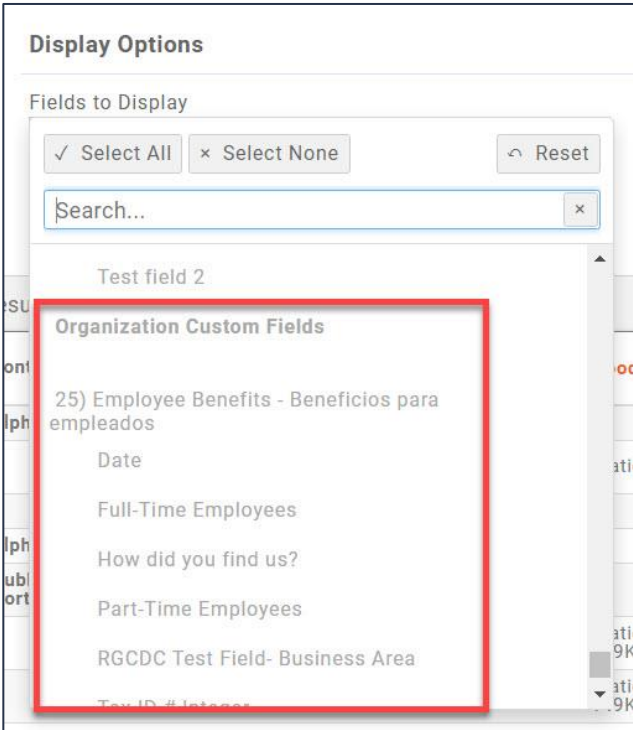
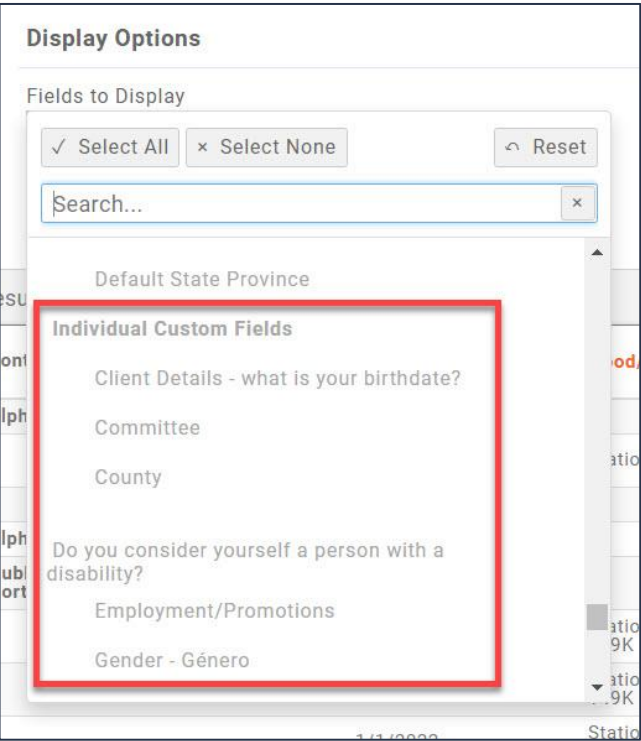
# Fields to Display

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If you have custom fields defined, you can generally find those under “Individual Custom Fields” (for fields set up as an Individual type) or “Organization Custom Fields” (for fields set up as a Business type).

These are fields that may be included on the membership application, event registrations, etc. and may display on a contact record “More Info” tab.

# Fields to Display



# Fields to Display

You can also rearrange the order of the fields in the report by clicking the orange fields icon, then dragging the fields into the order you prefer.



# Fields to Display

The order of the fields will stay in place if you save the report and if you export the report results.

Results: 9

Contact Name	Bill Contact ↕	Bill End Date ↕	Next Bill Date ↕	Frequency ↕	Discount Amount ↕	Fee Description ↕	Good/Service ↕	Price ↕	Quantity ↕	Renewal Month ↕	Total Amount ↕
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	A	B	C	D	E	F	G	H	I	J	K	L
1	Summary	Bill Contact	Bill End Date	Next Bill Date	Frequency	Discount Amount	Fee Description	Good/Service	Price	Quantity	Renewal Month	Total Amount



# Additional Criteria

You can add report filters by using the Additional Criteria section to select fields to include in your criteria.

Back

Accounts Receivable Aging Details Run Report

Displays detailed information on aging customer accounts. [View More](#)

Report Date: 4/20/2021 Days Overdue: Good/Service Type: -- No Choice -- Product Category: -- Select a Product Categ -- Income Account: -- Select an Income Acco -- Item Accounting Type: Cash basis

Additional Criteria / Filters

+ DueDate Between Jan 1, 2020 - Dec 31, 2020 x

Display Options

Fields to Display: Aging, DueDate, Open Balance, Ref Number, Contact Name Summarize By: Add Summarize By Display Mode: Detail

Results: 9

Contact Name	Ref Number	DueDate	Aging	Open Balance
Wizard's Supply Co	283	11/5/2020	166	50.00
Hubbard Broadcasting - North	312	10/23/2020	179	150.00
Alexander Wizard	290	10/2/2020	200	25.00
Charity Carpenter	279	9/21/2020	211	30.00
Charity Carpenter	276	8/21/2020	242	30.00
Charity Carpenter	244	7/21/2020	273	30.00
Charity Carpenter	236	6/21/2020	303	30.00

# Example

I want to generate a report of my contacts that includes the following information: Org Name, Primary Contact, Primary Contact Email Address, Primary Contact Phone for just those with a Corporate Membership

Back

Contacts Report Run Report

Contact Type: Organization | Contact Status: Active | Membership Type: Corporate Membership | Membership Category: None Selected

Assigned To: None Selected | List/Committee: None Selected | Chapter: None Selected | Tags: Add Tags

Last Communication Date: No Dates Selected | Directory: -- Select a Directory -- | State Province: None Selected | Primary Contact:  | Active Contacts:

Select Criteria/Filters

Criteria / Filters: +

Display Options

Fields to Display: Primary Membership Type, Contact Name, Primary Business Membership Start Date, Primary Contact Email, Primary Contact Name, Primary Contact Phone

Summarize By: | Display Mode: Detail

Add Summarize By

# Example

I want to generate a report of my contacts that includes the following information: Org Name, Primary Contact, Primary Contact Email Address, Primary Contact Phone for just those with a Corporate Membership where the primary contact does not have a default email

The screenshot shows the 'Contacts Report' configuration page. At the top right, there is a 'Run Report' button. The main area contains several filter sections:

- Contact Type:** Organization
- Contact Status:** Active
- Membership Type:** Corporate Membership
- Membership Category:** None Selected
- Assigned To:** None Selected
- List/Committee:** None Selected
- Chapter:** None Selected
- Tags:** Add Tags
- Last Communication Date:** No Dates Selected
- Directory:** -- Select a Directory --
- State Province:** None Selected
- Primary Contact:**
- Active Contacts:**

**Select Criteria/Filters**

Criteria / Filters: + Primary Contact Email Is Empty (indicated by a red arrow) X

**Display Options**

Fields to Display: Primary Membership Type, Contact Name, Primary Business Membership Start Date, Primary Contact Email, Primary Contact Name, Primary Contact Phone

Summarize By: [Dropdown] Add Summarize By

Display Mode: Detail

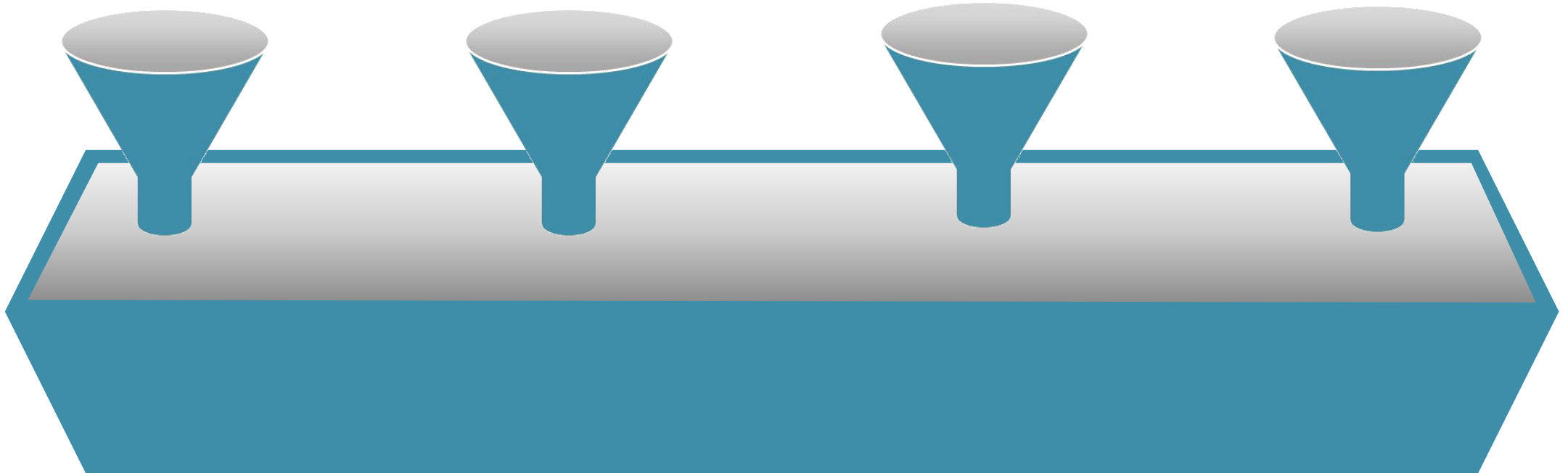
# The Operators...

The AND operator displays a record if **ALL** of your filter criteria are met. Think of them like graduated sieves stacked on top of one another- one by one they eliminate the items that don't fit, and the bucket at the end only contains those items.



# Additional Criteria

The OR operator displays a record if **ANY** of the conditions are met. Each OR acts as a sieve feeding into a bigger bucket containing all those results.



# Additional Criteria

Think of all the ANDs as ONE FILTER. When you add an OR, it is its own separate filter. Example:

Additional Criteria / Filters

+									
AND	Event Name	Contains	2021						X
	Event Name	Contains	bash						X
OR	Event Name	Contains	golf						X

# Additional Criteria

...will find all events with 2021 AND bash in the name, OR any event with Golf in the name.

Results: 12

Event Name	Contact Name	Default Email	Default Phone	Invoice	Event Start Date	Event End Date	Registration Date	Registration ID	Registration Status	Type	Description	Quantity	Price
<b>2021 Golf Tournament + Banquet</b>													
	Christopher March	cmarch@mailinator.com		288	8/18/2021	8/18/2021	8/25/2020	3214584	Registered	Registration	Team of Four	1.00	\$40.00
	Aaron Ashmore	aashmore@mailinator.com		288	8/18/2021	8/18/2021	8/25/2020	3214584	Registered				\$0.00
	Shelli March	shelli.march@mailinator.com		288	8/18/2021	8/18/2021	8/25/2020	3214584	Registered				\$0.00
	Shawn Ashmore	shawn.ashmore@mailinator.com		288	8/18/2021	8/18/2021	8/25/2020	3214584	Registered				\$0.00
													\$40.00
<b>2021 Golf Tournament + Banquet Count 4</b>													
<b>2022 Golf Tournament + Banquet</b>													
	Shawn Ashmore	shawn.ashmore@mailinator.com		327	8/19/2022	8/19/2022	2/22/2021	4160186	Registered				\$0.00
	Shelli March	shelli.march@mailinator.com		327	8/19/2022	8/19/2022	2/22/2021	4160186	Registered				\$0.00
	Alexander Wizard	alexander.wizard@mailinator.com	218-820-4558	328	8/19/2022	8/19/2022	2/24/2021	4164567	Registered	Registration	Team of Four	1.00	\$40.00
	Bill Wizard	bill.wizard@mailinator.com	2188204559	328	8/19/2022	8/19/2022	2/24/2021	4164567	Registered				\$0.00
													\$40.00
<b>2022 Golf Tournament + Banquet Count 4</b>													
<b>Fall Bash 2021 Fun Run</b>													
	Alexander Wizard	alexander.wizard@mailinator.com	218-820-4558	290	10/15/2021	10/15/2021	9/2/2020	3236180	Registered	Registration	1 Mile Run - Online Registration	1.00	\$13.00
	Alexander Wizard	alexander.wizard@mailinator.com	218-820-4558	290	10/15/2021	10/15/2021	9/2/2020	3236180	Registered	Additional Item	Embroidered Beanie	1.00	\$25.00
													\$38.00
<b>Fall Bash 2021 Fun Run Count 2</b>													
<b>Golf Tournament 2020 (no sessions)</b>													
					8/14/2020	8/14/2020							\$0.00
													\$0.00
<b>Golf Tournament 2020 (no sessions) Count 1</b>													
<b>Summer Bash 2021</b>													
					7/9/2021	7/9/2021							\$0.00
													\$0.00
<b>Summer Bash 2021 Count 1</b>													
													\$83.00
<b>Grand Count(Average Max Totals)</b>													
													12

# Additional Criteria

Adding another AND will essentially create two filters:

Additional Criteria / Filters

+		Event Name ▼	Contains ▼	2021	×
AND ▼		Event Name ▼	Contains ▼	bash	×
OR ▼		Event Name ▼	Contains ▼	golf	×
AND ▼		Event Name ▼	Contains ▼	2021	×



# Additional Criteria

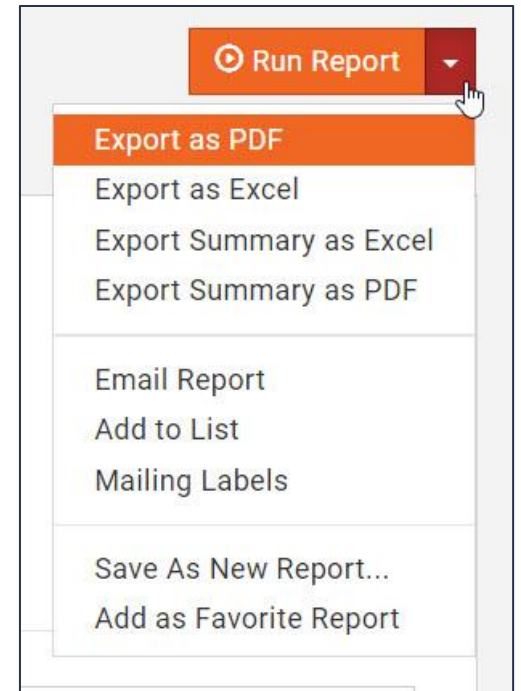
- ...and will return all events named 2021 AND bash, and all events named golf AND 2021.

Results: 7

Event Name	Contact Name	Default Email	Default Phone	Invoice	Event Start Date	Event End Date	Registration Date	Registration ID	Registration Status	Type	Description	Quantity	Price
<b>2021 Golf Tournament + Banquet</b>													
	Christopher March	cmarch@mailinator.com	288		8/18/2021	8/18/2021	8/25/2020	3214584	Registered	Registration	Team of Four	1.00	\$400.00
	Aaron Ashmore	aashmore@mailinator.com	288		8/18/2021	8/18/2021	8/25/2020	3214584	Registered				\$0.00
	Shelli March	shelli.march@mailinator.com	288		8/18/2021	8/18/2021	8/25/2020	3214584	Registered				\$0.00
	Shawn Ashmore	shawn.ashmore@mailinator.com	288		8/18/2021	8/18/2021	8/25/2020	3214584	Registered				\$0.00
												\$400.00	
<b>2021 Golf Tournament + Banquet Count 4</b>													
<b>Fall Bash 2021 Fun Run</b>													
	Alexander Wizard	alexander.wizard@mailinator.com	218-820-4558	290	10/15/2021	10/15/2021	9/2/2020	3236180	Registered	Registration	1 Mile Run - Online Registration	1.00	\$13.00
	Alexander Wizard	alexander.wizard@mailinator.com	218-820-4558	290	10/15/2021	10/15/2021	9/2/2020	3236180	Registered	Additional Item	Embroidered Beanie	1.00	\$25.00
												\$38.00	
<b>Fall Bash 2021 Fun Run Count 2</b>													
<b>Summer Bash 2021</b>													
					7/9/2021	7/9/2021							\$0.00
												\$0.00	
<b>Summer Bash 2021 Count 1</b>													
												Grand Count	\$438.00
												Average	
												Max	
												Totals	
												7	

# Exporting Reports: Detail

- Every report can be exported to either an Excel or PDF file.
- Reports without a “Summarize By” enabled can use the standard export, sending the entire results exactly as seen on screen to a file in the same format/order.



# Exporting Reports: Summary

If the report is using any “Summarize By” options, the “Export Summary as...” option will send that report as seen on screen to a file using the same criteria to summarize.

The screenshot shows the 'Accounts Receivable Aging Details' report interface. A dropdown menu is open, showing options to 'Export Summary as Excel' and 'Export Summary as PDF'. A red arrow points from the 'Export Summary as Excel' option to the summary table. Another red arrow points from the 'Summarize By' dropdown (set to 'Contact Name') to the 'Contact Name' column in the summary table. A third red arrow points from the 'Results: 9' label to the first row of the summary table.

	A	B	C	D	E	F
1	Summary	Ref Number	DueDate	Aging	Open Balance	
2	Alexander Wizard					
3		290	10/2/2020	200	\$25.00	
4	Alexander Wizard	1			\$25.00	
5	Babydog Wizard					
6		230	4/15/2020	370	\$10.00	
7	Babydog Wizard	1			\$10.00	
8	Charity Carpenter					
9		236	6/21/2020	303	\$30.00	
10		244	7/21/2020	273	\$30.00	
11		276	8/21/2020	242	\$30.00	
12		279	9/21/2020	211	\$30.00	
13	Charity Carpenter	4			\$120.00	
14	Hubbard Broadcasting - North					
15		312	10/23/2020	179	\$150.00	
16	Hubbard Broadcasting - North	1			\$150.00	
17	Wizards					
18		214	3/2/2020	414	\$25.00	
19	Wizards	1			\$25.00	
20	Wizard's Supply Co					
21		283	11/5/2020	166	\$50.00	
22	Wizard's Supply Co	1			\$50.00	
23	Grand Count\Average\Totals	9			\$380.00	
24						

# Exporting Reports: Summary

If the “Export Summary as...” option is not used to export, the report will lose the summarized aspect(s) of the results.

The screenshot shows a software interface for generating a 'Cash A/R for 2020' report. The interface includes various filters and options. A dropdown menu is open, showing the following options:

- Export as PDF
- Export as Excel
- Export Summary as Excel
- Export Summary as PDF

The table below is a summary of the report data, overlaid on the interface. It shows 9 results with columns for Contact Name, Ref Number, DueDate, Aging, and Open Balance.

Contact Name	Ref Number	DueDate	Aging	Open Balance
Alexander Wizard	290	10/2/2020	200	\$25.00
Babydog Wizard	230	4/15/2020	370	\$10.00
Charity Carpenter	236	6/21/2020	303	\$30.00
Charity Carpenter	244	7/21/2020	273	\$30.00
Charity Carpenter	276	8/21/2020	242	\$30.00
Charity Carpenter	279	9/21/2020	211	\$30.00
Hubbard Broadcasting - North	312	10/23/2020	179	\$150.00
Wizards	214	3/2/2020	414	\$25.00
Wizard's Supply Co	283	11/5/2020	166	\$50.00
<b>Count\Average\Totals</b>			<b>9</b>	<b>\$380.00</b>

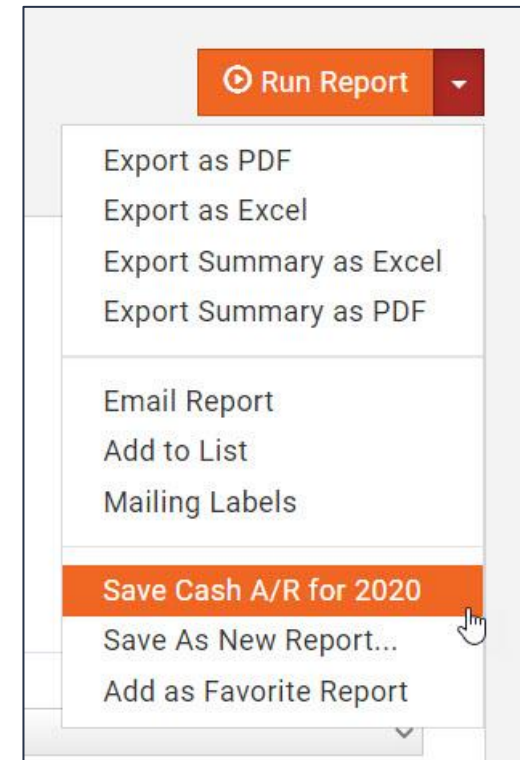
# Saving Reports

If you are setting up a new report, once you have criteria set up to pull the desired data, you can save the report so the next time you run it, it will retain the filters you set up.

The screenshot shows the 'Accounts Receivable Aging Details' report configuration page. The page includes a 'Back' link, a 'Run Report' button, and a dropdown menu with options: 'Export as PDF', 'Export as Excel', 'Export Summary as Excel', 'Export Summary as PDF', and 'Email Report'. The main configuration area has several input fields: 'Report Date' (4/20/2021), 'Days Overdue', 'Good/Service Type' (-- No Choice --), 'Product Category' (-- Select a Product Categ --), and 'Income Account' (-- Select an Income Accou --). Below these are 'Additional Criteria / Filters' and 'Display Options' sections. The 'Fields to Display' section shows 'Aging, DueDate, Open Balance, Ref Number, Contact Name' and the 'Summarize By' section shows 'Contact Name'. A 'Results: 9' indicator is visible at the bottom left. A modal dialog box titled 'Add Save Report...' is open in the foreground, containing a 'Report Name' field with the text 'Cash A/R for 2020', a 'Description' field with the text 'Displays detailed information on aging customer accounts.', and a checkbox for 'Hide This Report From Other Users'. The dialog has 'Cancel' and 'Done' buttons at the bottom right.

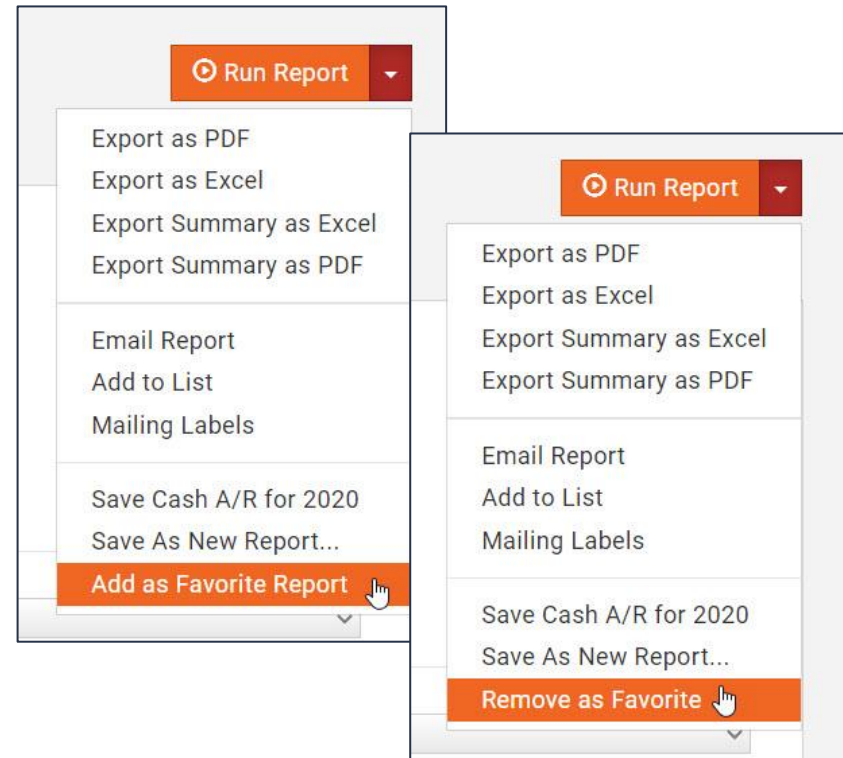
# Saving Reports

If you pull up a saved report and change the criteria in it, the report can be re-saved as that same report.



# Favorite Reports

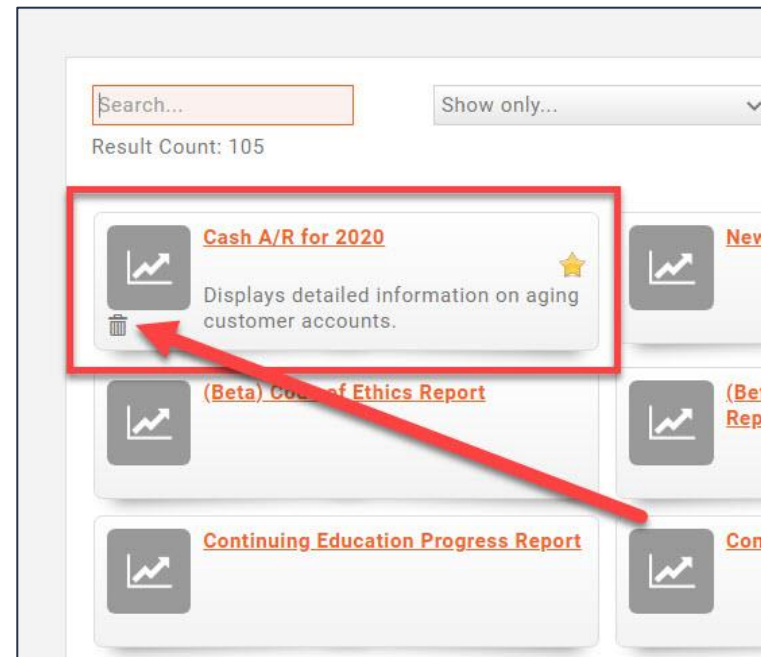
If you access a report frequently, you can save that report as a favorite to pin it to the top of the report list with a gold star- and you can remove reports as favorites as well.





# Favorite Reports

You can also delete a saved report if you find you no longer need or use it.





# Synchronize Lists and Reports

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If you have a list of members meeting certain criteria (example: active members without Info Hub accounts set up), you can set that list to update nightly with the saved report.

(VERY helpful when using a Marketing Automation workflow or sending out regular calls to action!)

# Synchronize Lists and Reports

1. Set up the report to pull your desired contacts.

The screenshot shows the 'User Account Report' configuration page. At the top left is a 'Back' link, and at the top right is a 'Run Report' button. The main configuration area includes several filter sections:

- Access Level Type:** None Selected
- Access Level:** None Selected
- Account Created Within:** No Dates Selected
- Membership Type:** None Selected
- Membership Status:** Active
- Has Account:**

**Additional Criteria / Filters:** A plus sign icon is followed by a filter rule: 'Account Username' is 'Is Empty'.

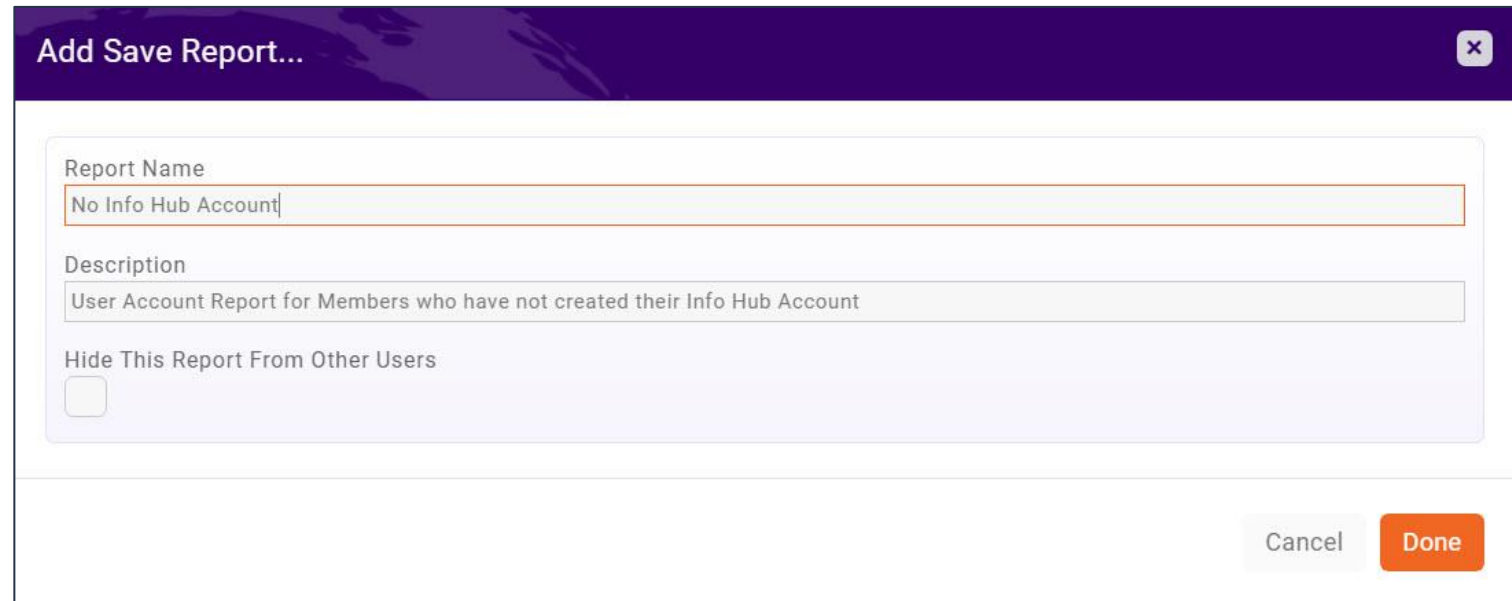
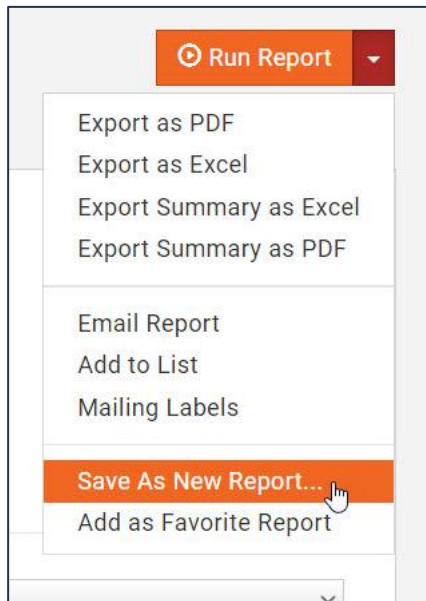
**Display Options:**

- Fields to Display:** A list of fields including 'Access Levels with Related Organizations', 'Account Created Date', 'Account Email', 'Account Username', 'Contact First Name', 'Contact Last Name', 'Contact Name', 'Date of Last Password Change', 'Individual/Default Access Level', 'Last Login Date/Time', 'Membership Type', and 'Primary Business'.
- Summarize By:** A dropdown menu with an 'Add Summarize By' link below it.
- Display Mode:** Detail

At the bottom, it shows 'Results: 44' and the beginning of a table with columns for 'Contact', 'Account', and 'Date of Last'.

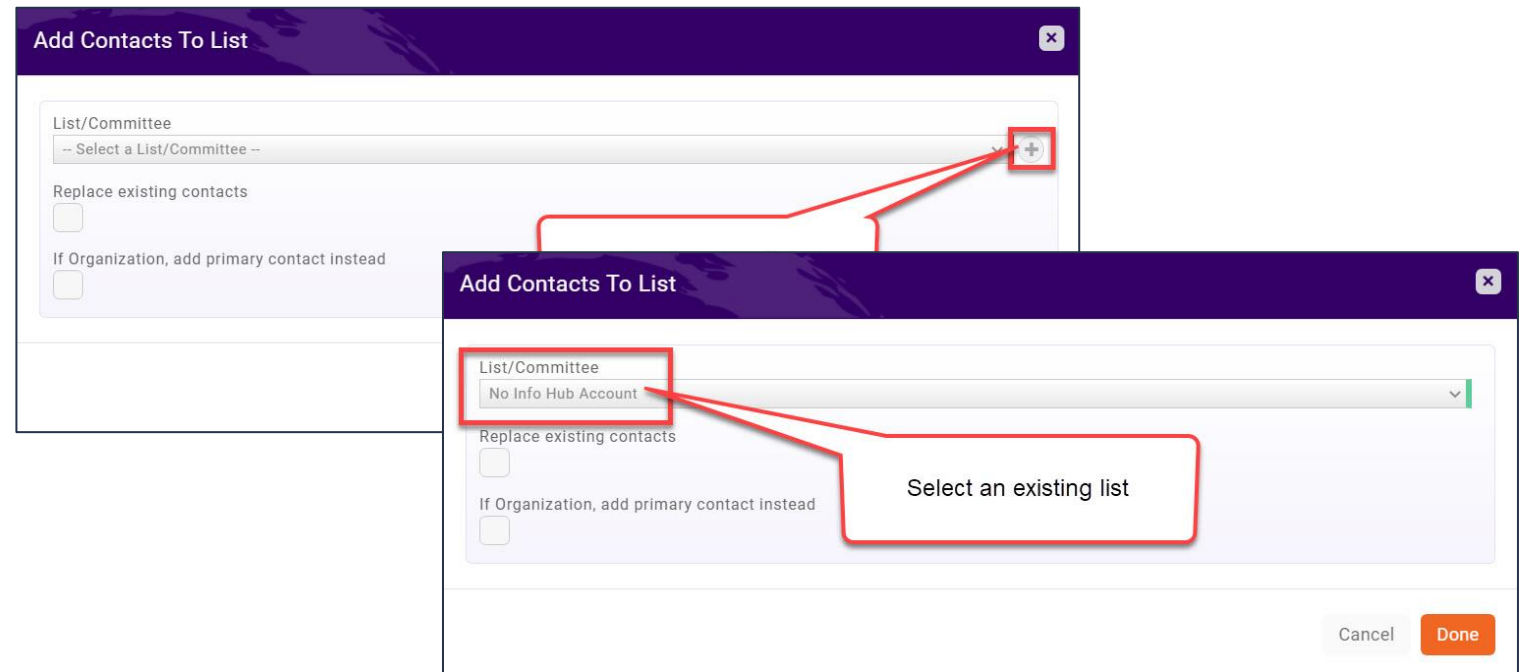
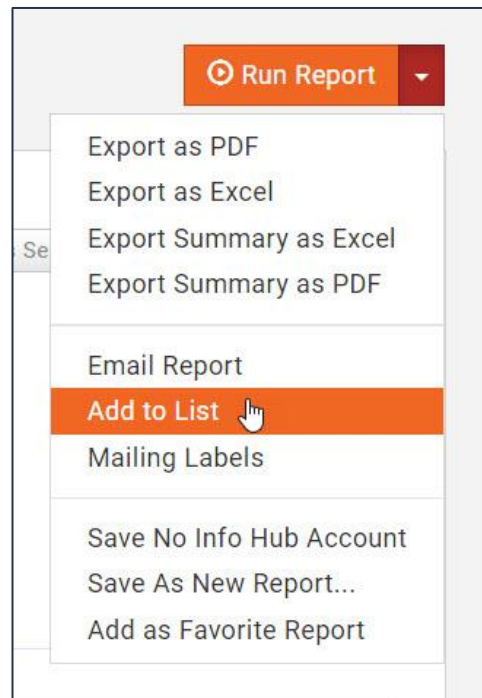
# Synchronize Lists and Reports

2. Save the report; give it a unique/easily identifiable name!



# Synchronize Lists and Reports

3. Use the “Add to List” option; either create a new list by clicking the “+”, or select a list you previously created.



# Synchronize Lists and Reports

- If creating a new list, fill out the required info, enable any desired options, and select your saved report in the “Synchronize Nightly with Report” drop down, and click Done.

The screenshot shows a web form for creating a new list. The form is divided into several sections:

- Top Section:** Includes a "Save" button in the top right corner. Below it are three input fields: "Name" (containing "No Info Hub Account"), "Category" (a dropdown menu showing "Email Lists"), and "Established On" (an empty date field).
- Form Fields:** Below the top section are several input fields: "Show When Unsubscribing" (checkbox), "Description" (text area), "Sponsor" (text field), "Meeting Time Description" (text field), and "Default Term (Months)" (text field).
- General Settings:** A section with three options: "Is Active" (checkbox checked), "Synchronize Contacts with authorized third party newsletter solution" (checkbox), and "Synchronize Nightly with Report" (dropdown menu showing "No Info Hub Account"). The "Synchronize Nightly with Report" dropdown is highlighted with a red box. Below it is "Disallow Opt Out" (checkbox).
- Public Display Options:** A section with two options: "Allow External Use" (checkbox) and "Allow Public Subscribers" (checkbox).
- Hub Display Options:** A section with three options: "Users can see List in My Info or My Subscriptions" (checkbox), "Users Can Join" (checkbox), and "Users on List can view other Users on List" (checkbox).

At the bottom right of the form, there are "Cancel" and "Done" buttons.

# Synchronize Lists and Reports

If using an existing list, open the list after adding the report contacts to it and select the saved report in the “Synchronize Nightly with Report” dropdown and click Save.

The screenshot shows the 'No Info Hub Account' settings page. The page has a header with a 'Back to Lists/Committees' link and a 'No Info Hub Account' title. Below the title are tabs for 'General', 'Contacts', 'Communication', 'Events', 'Files', and 'Import'. The 'General' tab is active. The page contains several form fields: 'Name' (No Info Hub Account), 'Category' (Email Lists), 'Established On', 'Show When Unsubscribing' (checkbox), 'Description', 'Sponsor', 'Meeting Time Description', and 'Default Term (Months)'. There is a 'Save' button in the top right corner. Below the form fields is a 'General Settings' section with 'Is Active' (checked), 'Synchronize Contacts with authorized third party newsletter solution' (checkbox), 'Synchronize Nightly with Report' (dropdown menu, highlighted with a red box), and 'Disallow Opt Out' (checkbox). At the bottom is a 'Public Display Options' section with 'Allow External Use' (checkbox) and 'Allow Public Subscribers' (checkbox). A '1 ?' icon is in the bottom right corner.

# Resources

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[Smart Lists](#)

[Export Reports](#)

[Email Reports](#)

[Add Report Contacts to a List/Committee](#)

[Mailing Labels](#)

[Save a Report as a New Report](#)

[Save a report as a Favorite Report](#)

[Report Filtering Options](#)

[Report Filtering Operators](#)

[Select Report Fields to Display](#)

[Reorder Report Fields to Display](#)

# Questions?