# 5 Things you might not know…Reports

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# Agenda

- 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

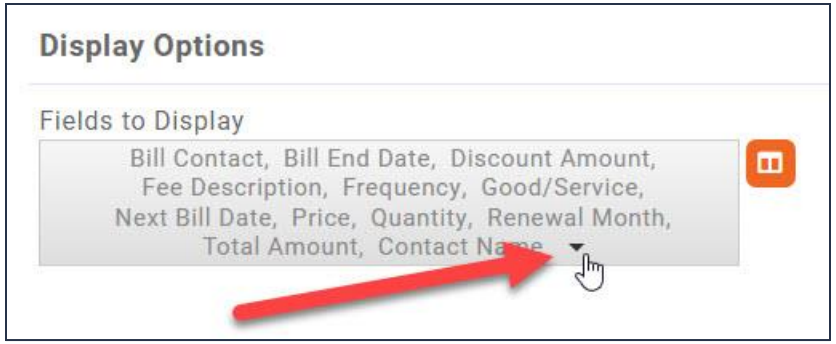
# Example

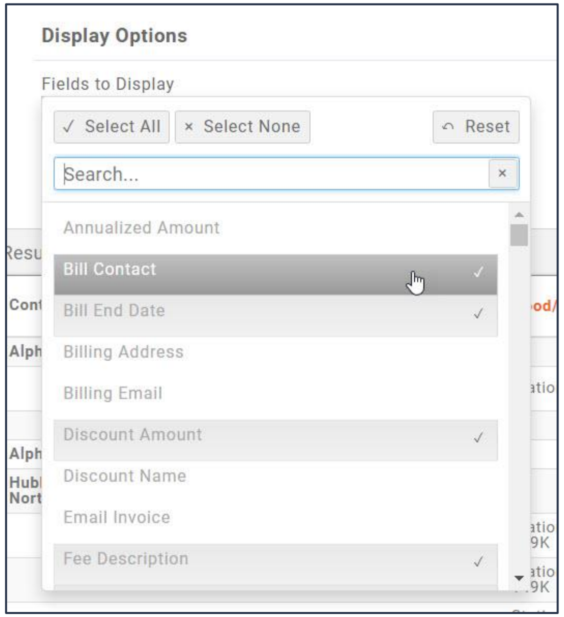
I want to generate a report of my contacts that includes the following information:

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.



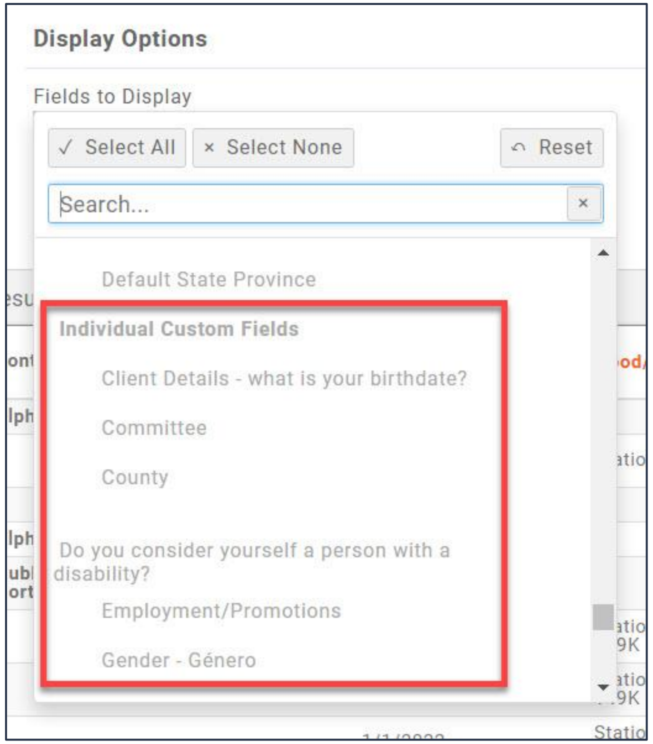

Click to select or deselect fields as needed.

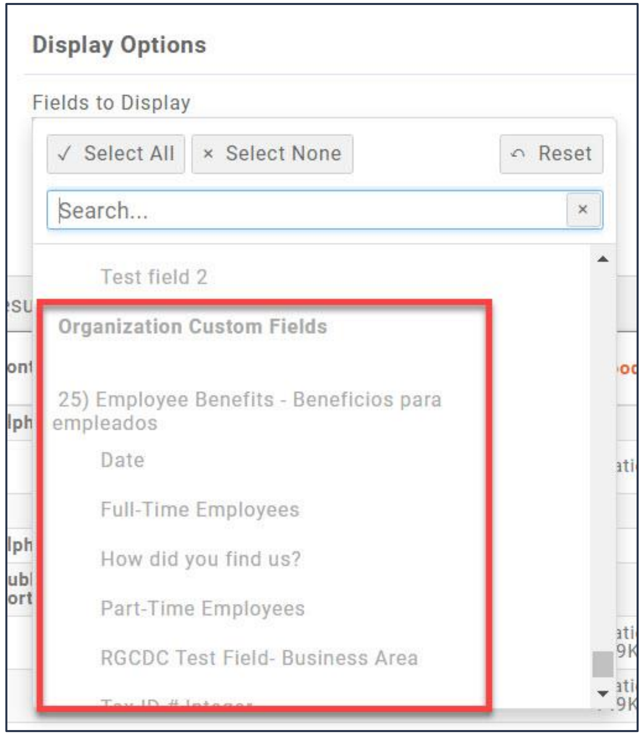
# Fields to Display

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

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# 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|

| | 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 |

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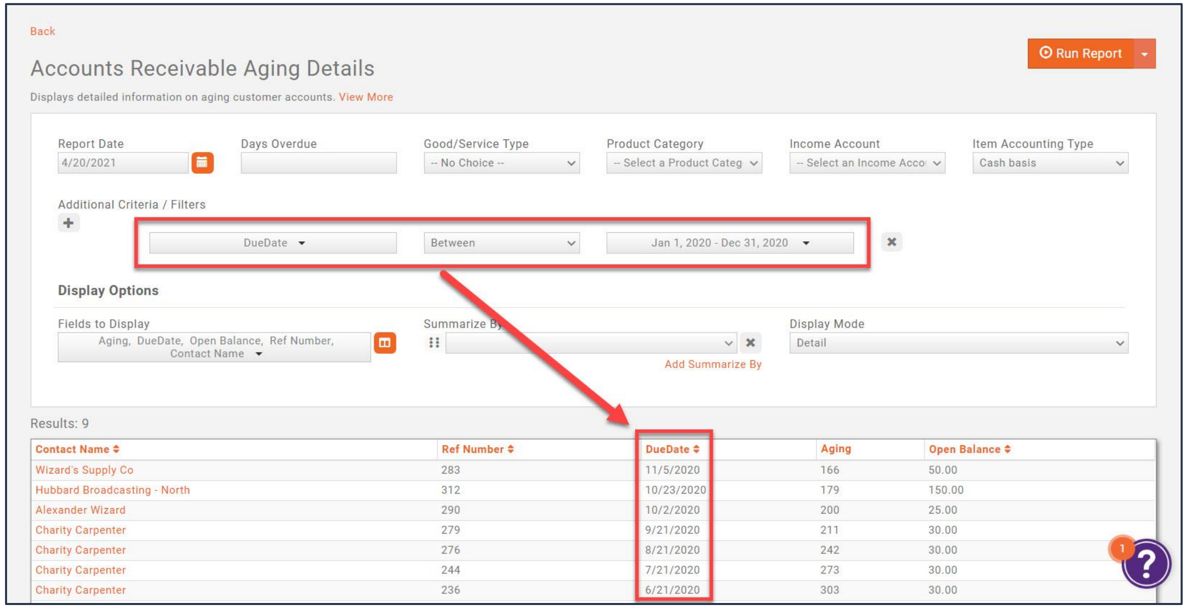
# Additional Criteria

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

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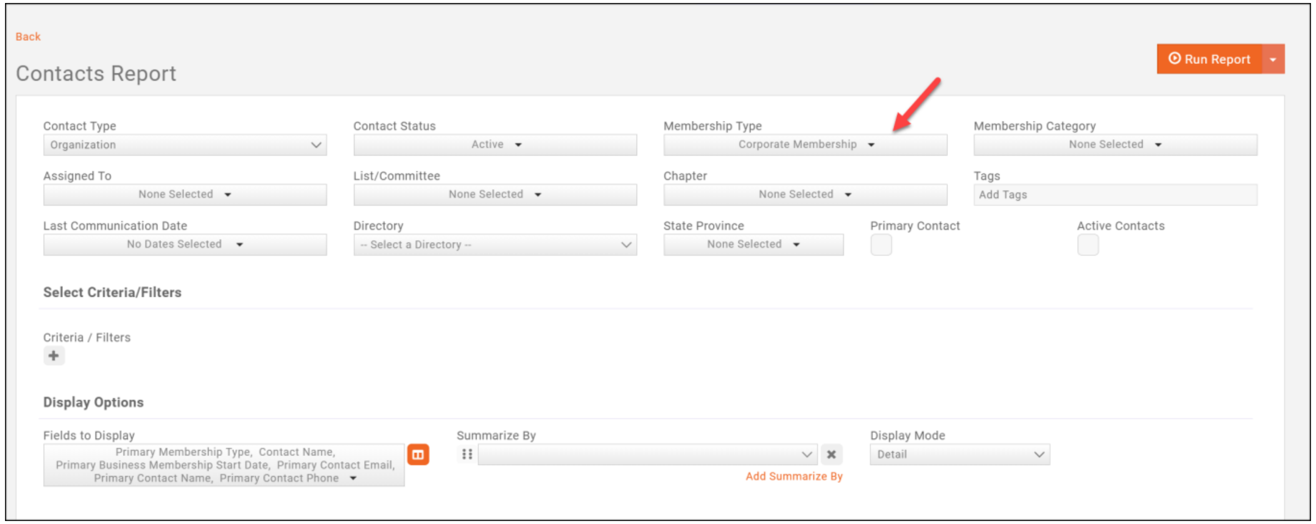
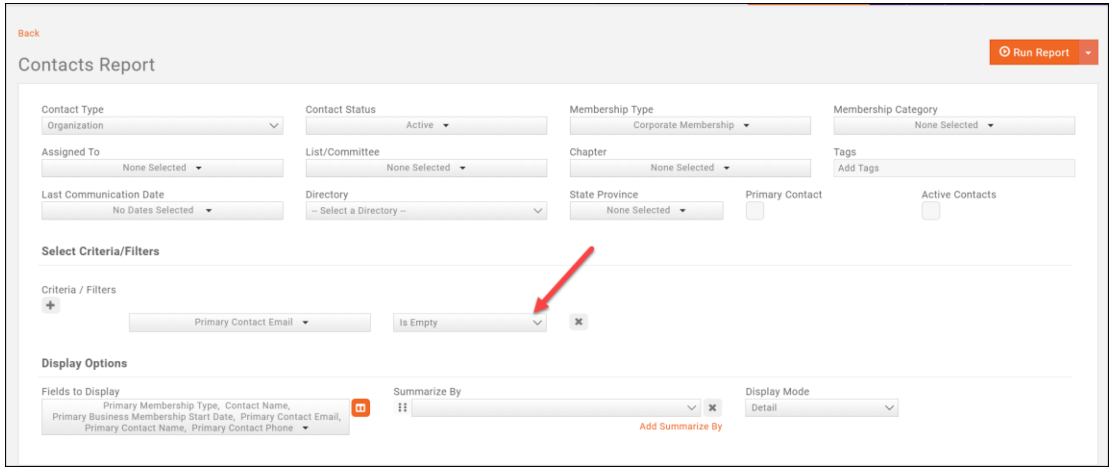
# Example

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 <u>for just those with a Corporate Membership</u>



# 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 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.

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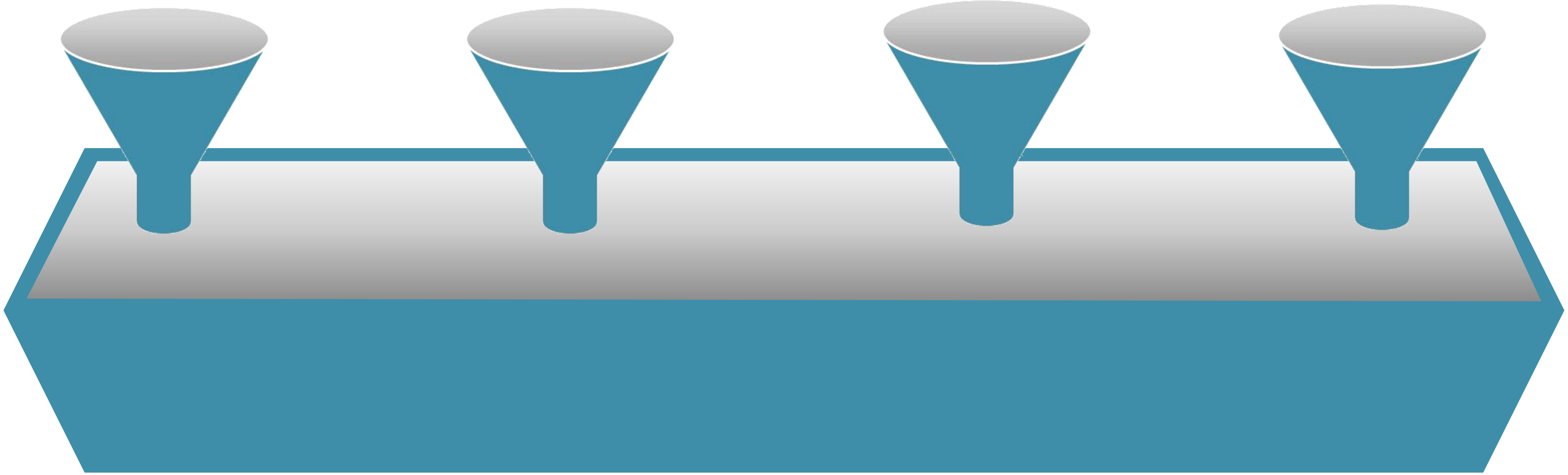
# Additional Criteria

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.



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# Additional Criteria

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

# Additional Criteria

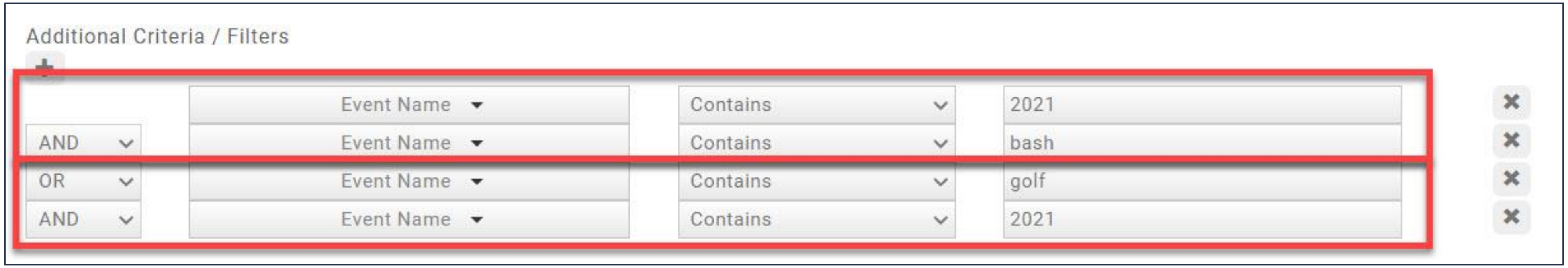
…will find all events with 2021 AND bash in the name, OR any event with Golf in the name.

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 | Pric |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2021 Golf Tournament + Banquet | | | | | | | | | | | | | |
| | Christopher March | cmarch@mailinator.com | | 288 | 8/18/2021 | 8/18/2021 | 8/25/2020 | 3214584 | Registered | Registration | Team of Four | 1.00 | $40 |
| | Aaron Ashmore | aashmore@mailinator.com | | 288 | 8/18/2021 | 8/18/2021 | 8/25/2020 | 3214584 | Registered | | | | $0.0 |
| | Shelli March | shelli.march@mailinator.com | | 288 | 8/18/2021 | 8/18/2021 | 8/25/2020 | 3214584 | Registered | | | | $0.0 |
| | Shawn Ashmore | shawn.ashmore@mailinator.com | | 288 | 8/18/2021 | 8/18/2021 | 8/25/2020 | 3214584 | Registered | | | | $0.0 |
| | | | | | | | | | | | | | $40 |
| 2021 Golf Tournament + Banquet Count 4 | | | | | | | | | | | | | |
| 2022 Golf Tournament + Banquet | | | | | | | | | | | | | |
| | Shawn Ashmore | shawn.ashmore@mailinator.com | | 327 | 8/19/2022 | 8/19/2022 | 2/22/2021 | 4160186 | Registered | | | | $0.0 |
| | Shelli March | shelli.march@mailinator.com | | 327 | 8/19/2022 | 8/19/2022 | 2/22/2021 | 4160186 | Registered | | | | $0.0 |
| | 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 |
| | Bill Wizard | bill.wizard@mailinator.com | 2188204559 | 328 | 8/19/2022 | 8/19/2022 | 2/24/2021 | 4164567 | Registered | | | | $0.0 |
| | | | | | | | | | | | | | $40 |
| 2022 Golf Tournament + Banquet Count 4 | | | | | | | | | | | | | |
| Fall Bash 2021 Fun Run | | | | | | | | | | | | | |
| | 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 |
| | 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 |
| | | | | | | | | | | | | | $38 |
| Fall Bash 2021 Fun Run Count 2 | | | | | | | | | | | | | |
| Golf Tournament 2020 (no sessions) | | | | | | | | | | | | | |
| | | | | | 8/14/2020 | 8/14/2020 | | | | | | | $0.0 |
| | | | | | | | | | | | | | $0.0 |
| Golf Tournament 2020 (no sessions) Count 1 | | | | | | | | | | | | | |
| Summer Bash 2021 | | | | | | | | | | | | | |
| | | | | | 7/9/2021 | 7/9/2021 | | | | | | | $0.0 |
| | | | | | | | | | | | | | $0.0 |
| Summer Bash 2021 Count 1 | | | | | | | | | | | | | |
| Grand Count\Average\Max\Totals 12 | | | | | | | | | | | | | $83 |

# Additional Criteria

Adding another AND will essentially create two filters:



# 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2021 Golf Tournament + Banquet | | | | | | | | | | | | | |
| | 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 |
| 2021 Golf Tournament + Banquet Count 4 | | | | | | | | | | | | | |
| Fall Bash 2021 Fun Run | | | | | | | | | | | | | |
| | 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 |
| Fall Bash 2021 Fun Run Count 2 | | | | | | | | | | | | | |
| Summer Bash 2021 | | | | | | | | | | | | | |
| | | | | | 7/9/2021 | 7/9/2021 | | | | | | | $0.00 |
| | | | | | | | | | | | | | $0.00 |
| Summer Bash 2021 Count 1 | | | | | | | | | | | | | |
| Grand Count\Average\Max\Totals 7 | | | | | | | | | | | | | $438.00 |

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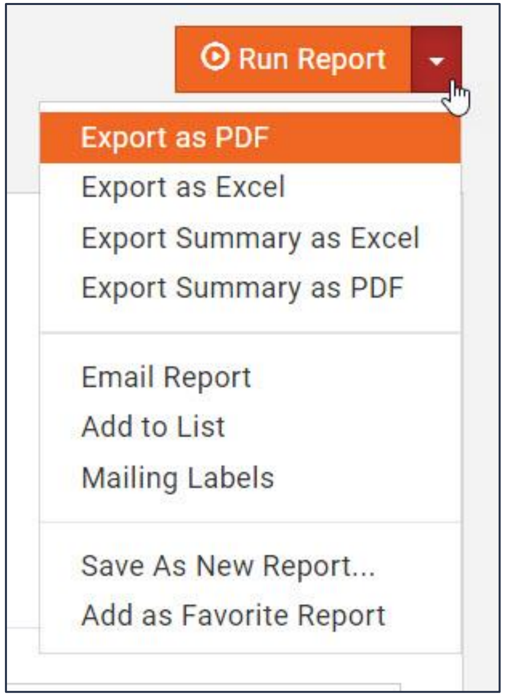
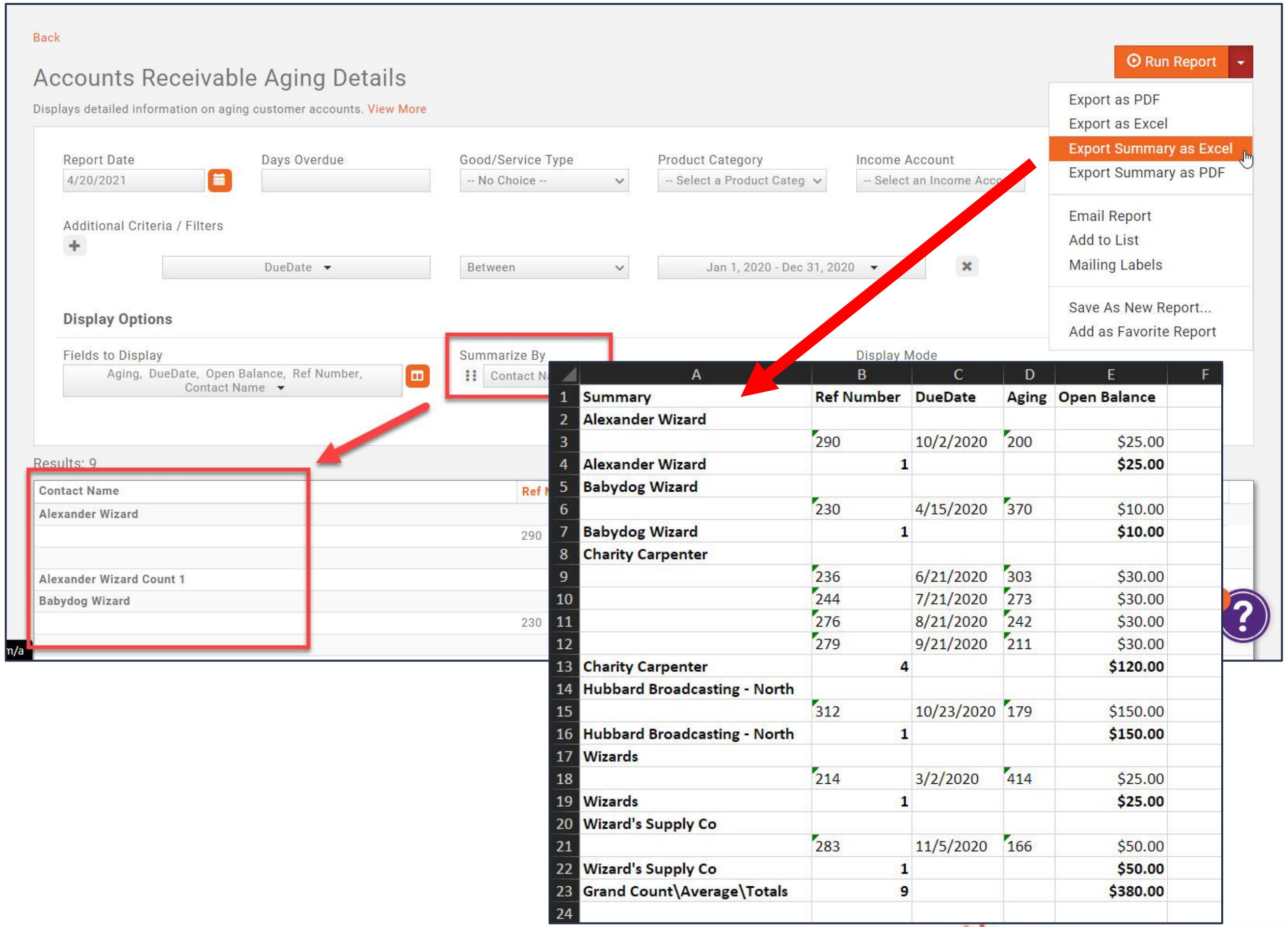
# Exporting Reports: Detail

- 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.

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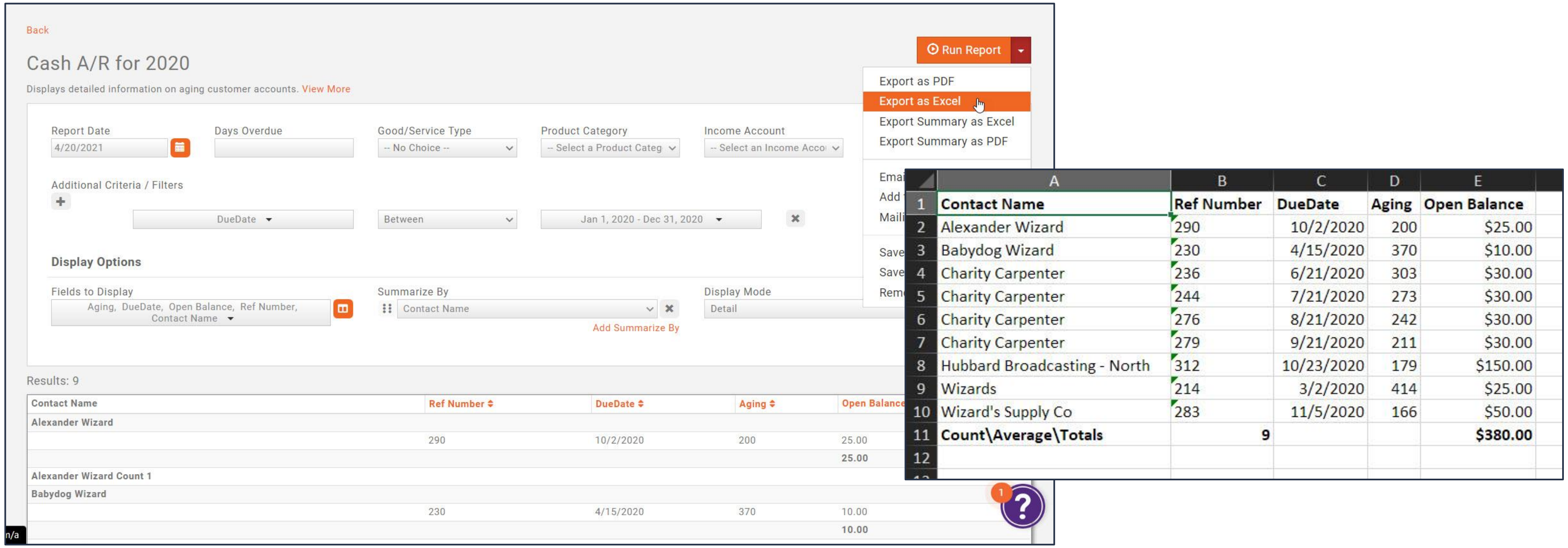
# Exporting Reports: Summary

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

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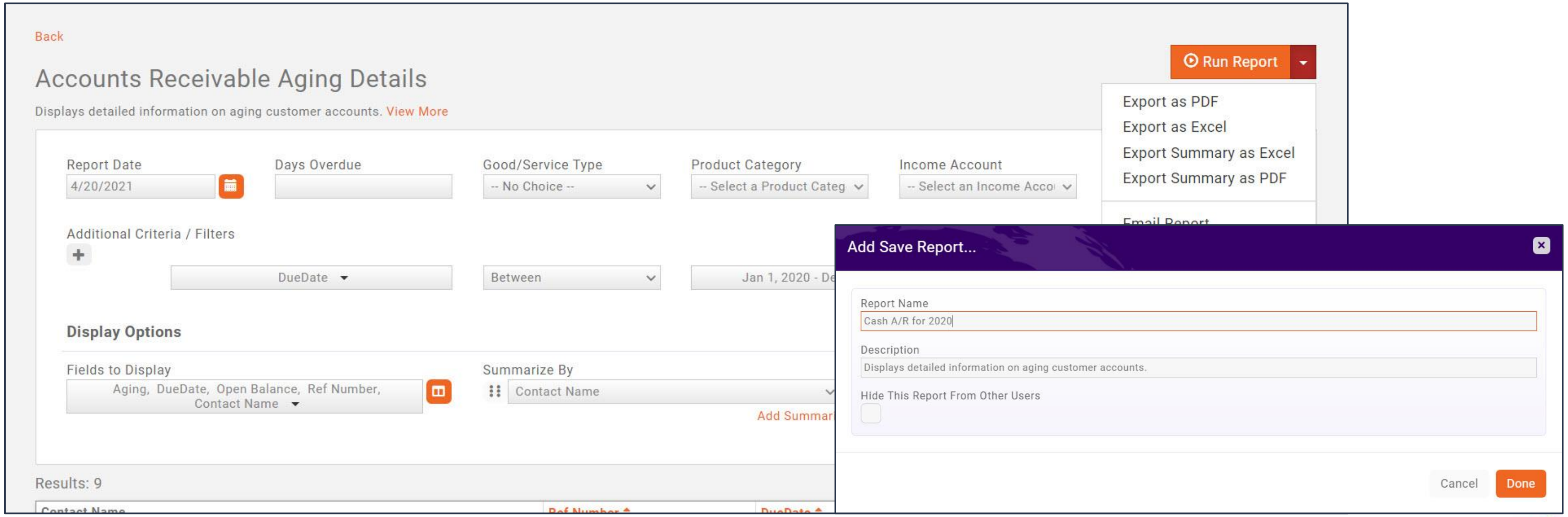
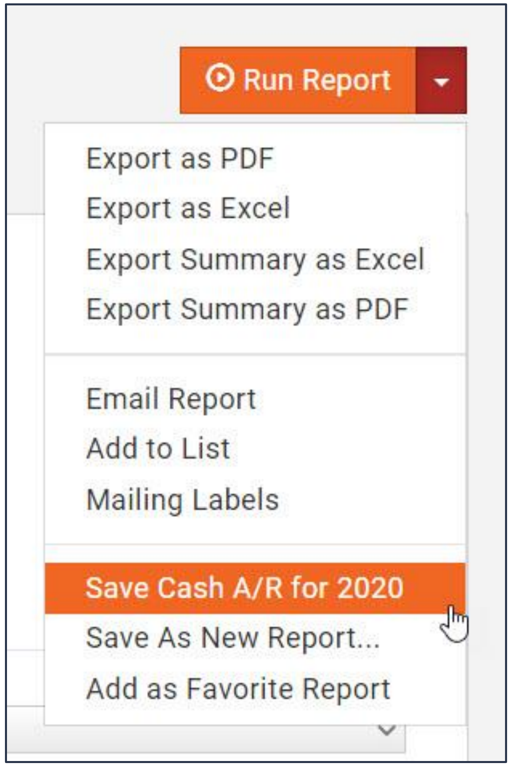
# Saving Reports

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.



# 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.

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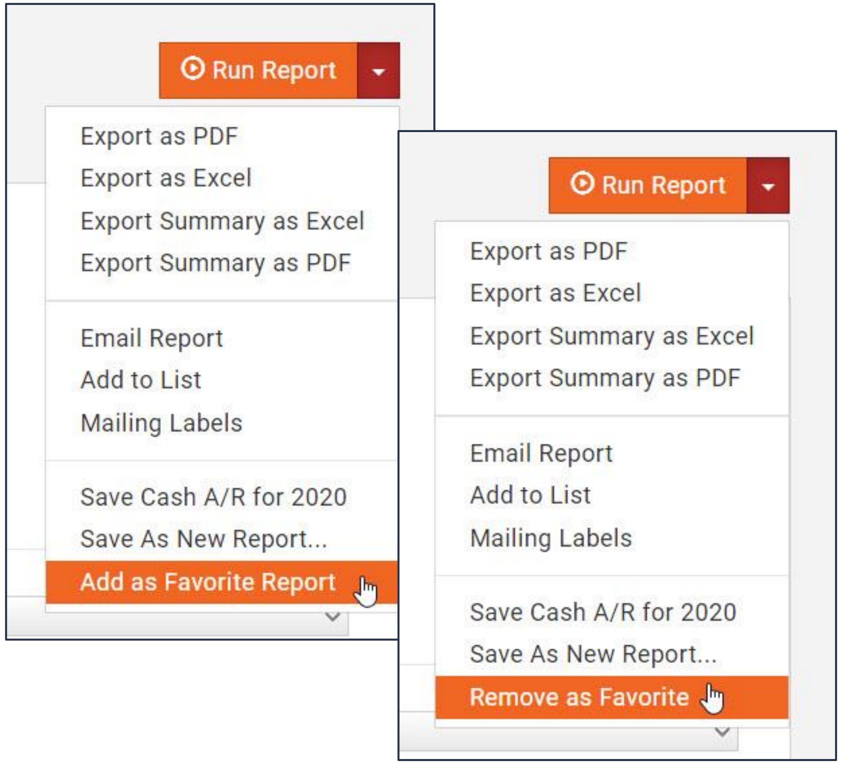
# Favorite Reports

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.

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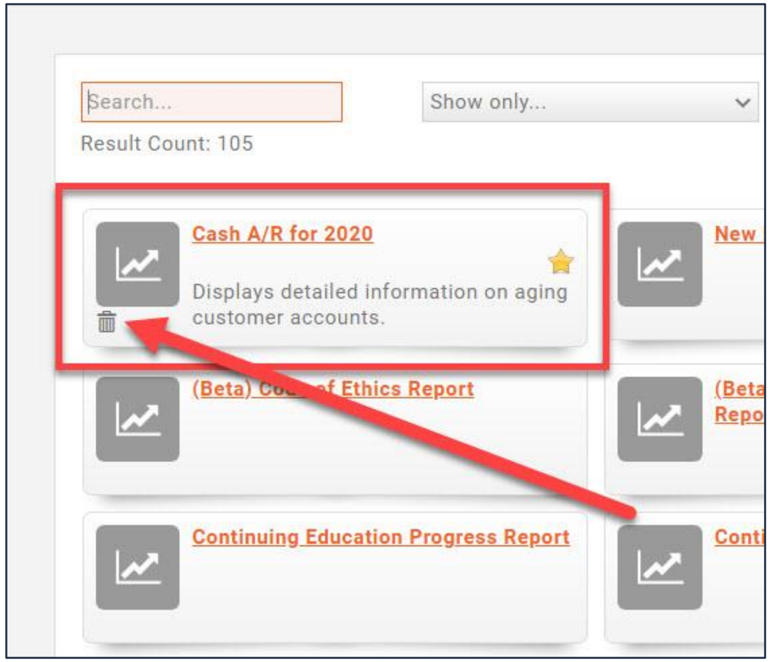
# Favorite Reports

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



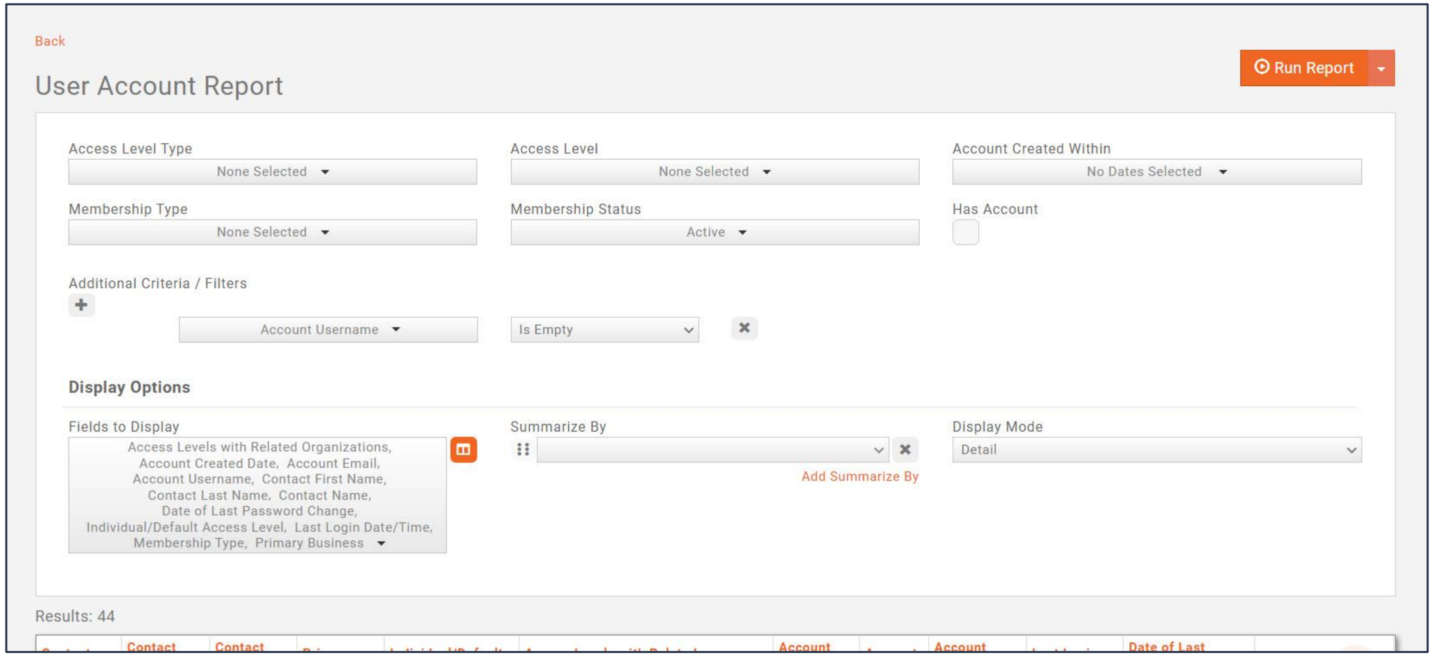
# Synchronize Lists and Reports

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!)

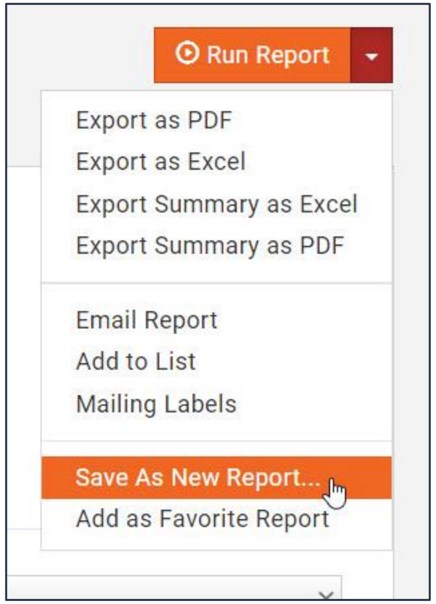
# Synchronize Lists and Reports

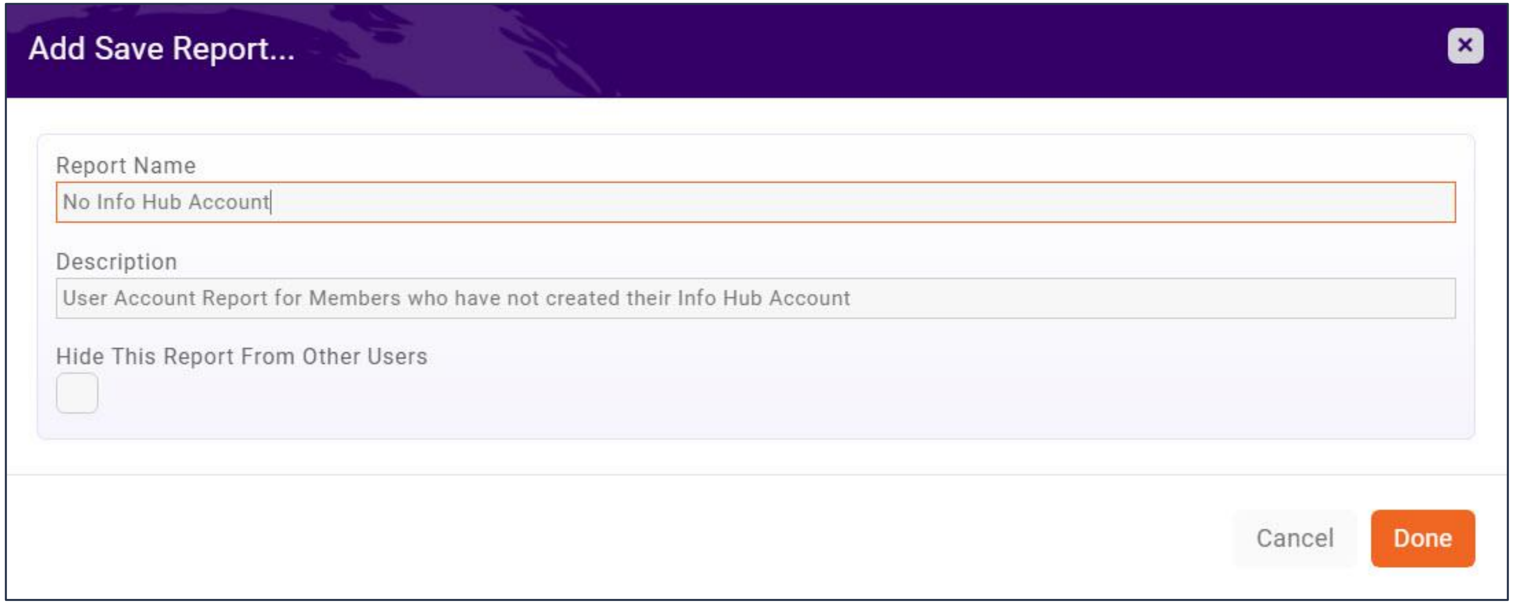
1. Set up the report to pull your desired contacts.



# Synchronize Lists and Reports

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

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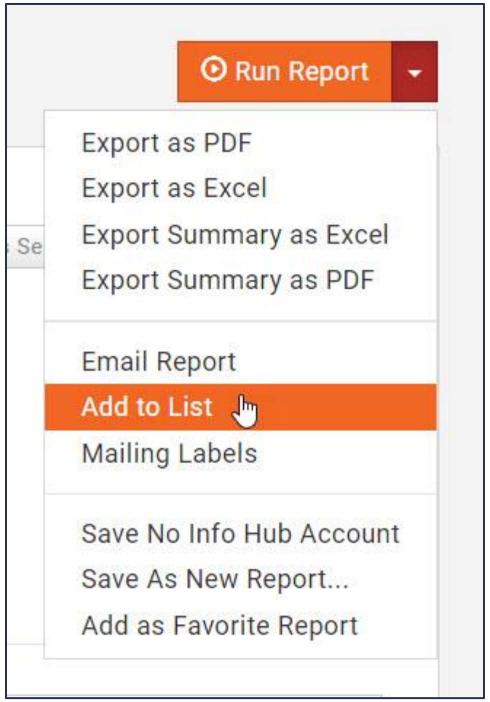
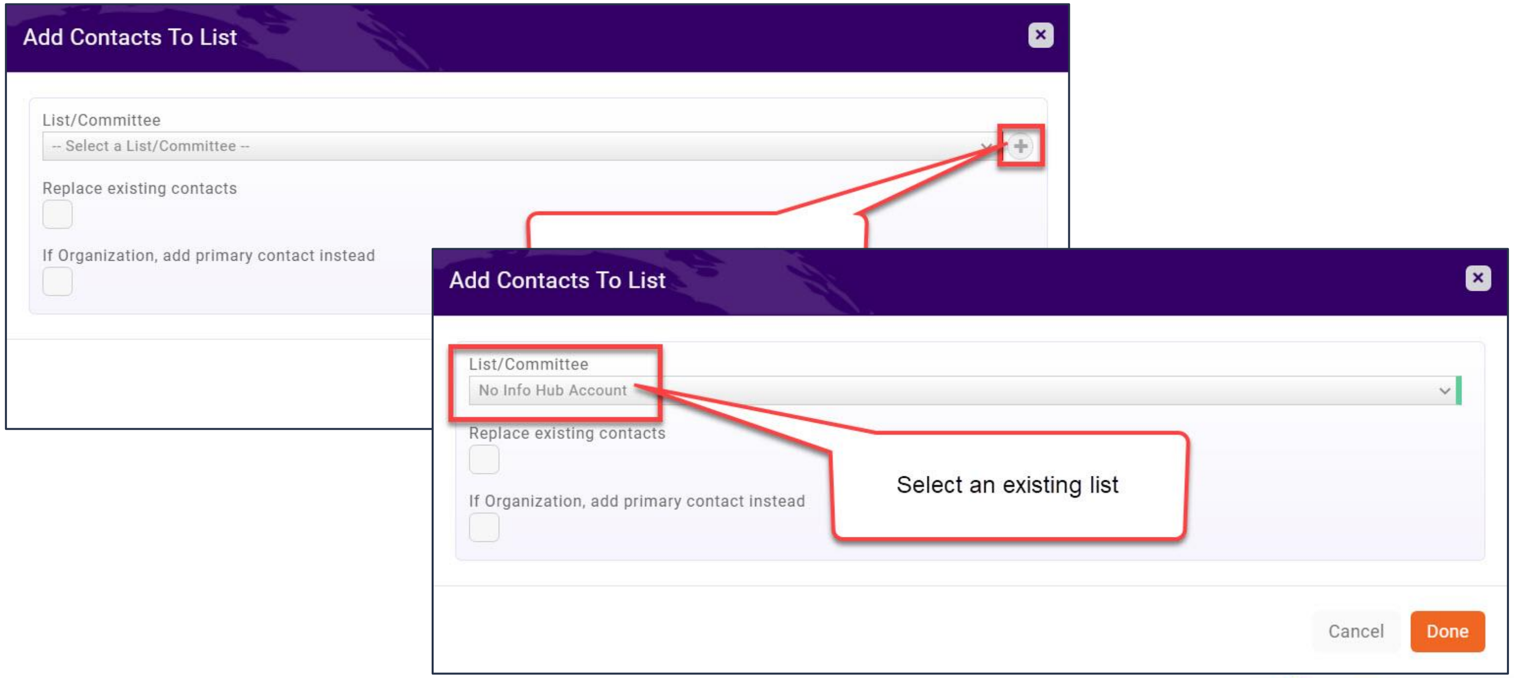
# Synchronize Lists and Reports

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

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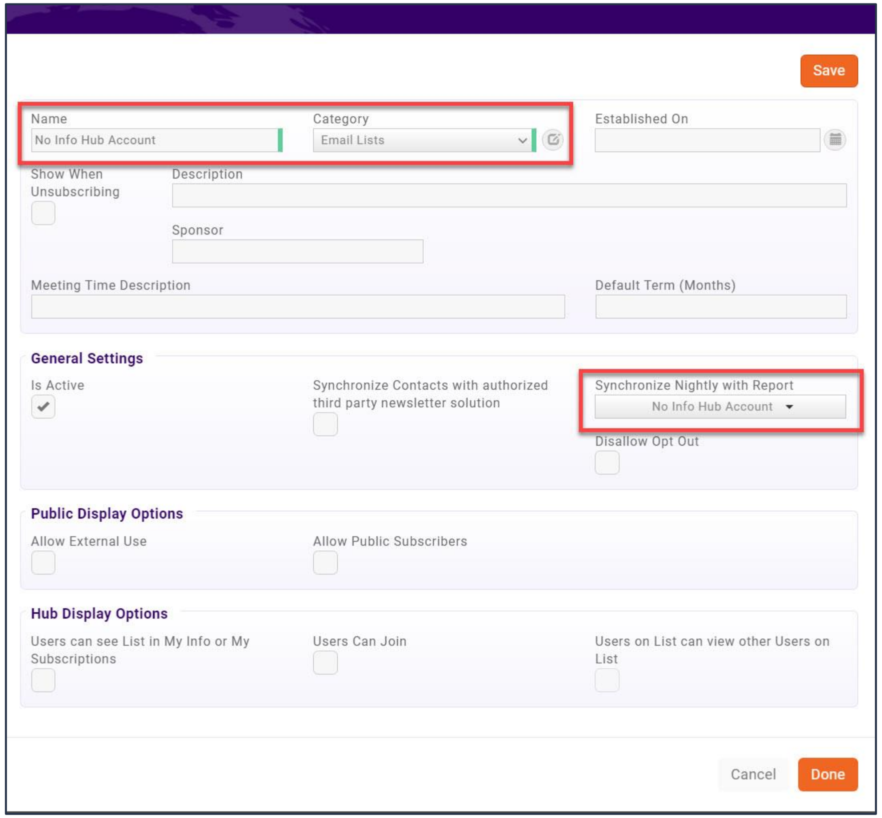
# Synchronize Lists and Reports

- 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.

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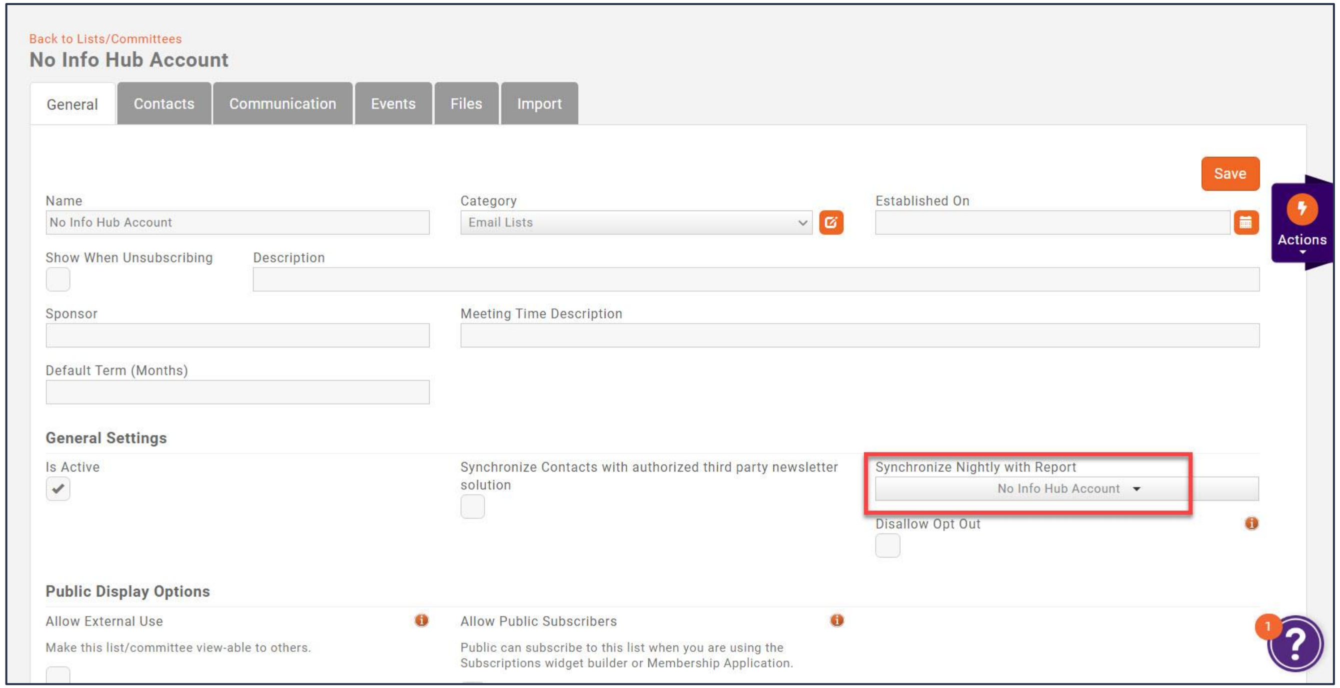
# Synchronize Lists and Reports

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.



# Resources

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?

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