GrowthZone Classroom Training: Working with Reports

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COMMON REPORT FUNCTIONS

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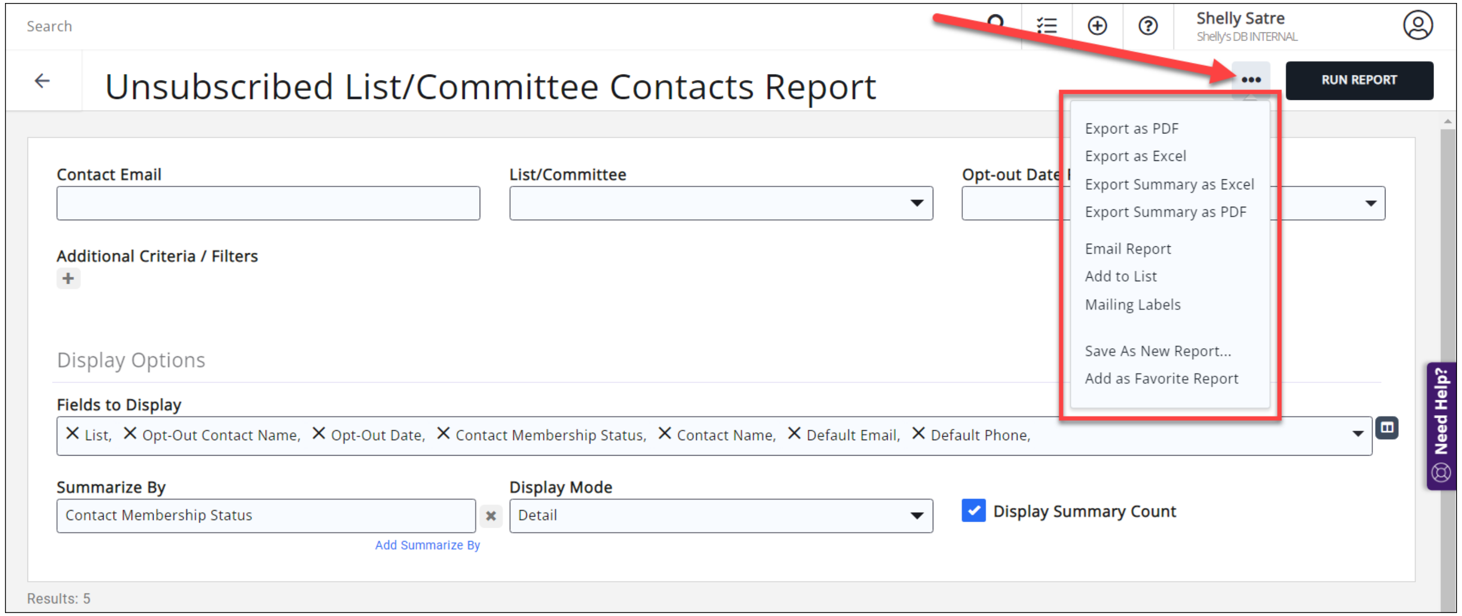
Export Reports

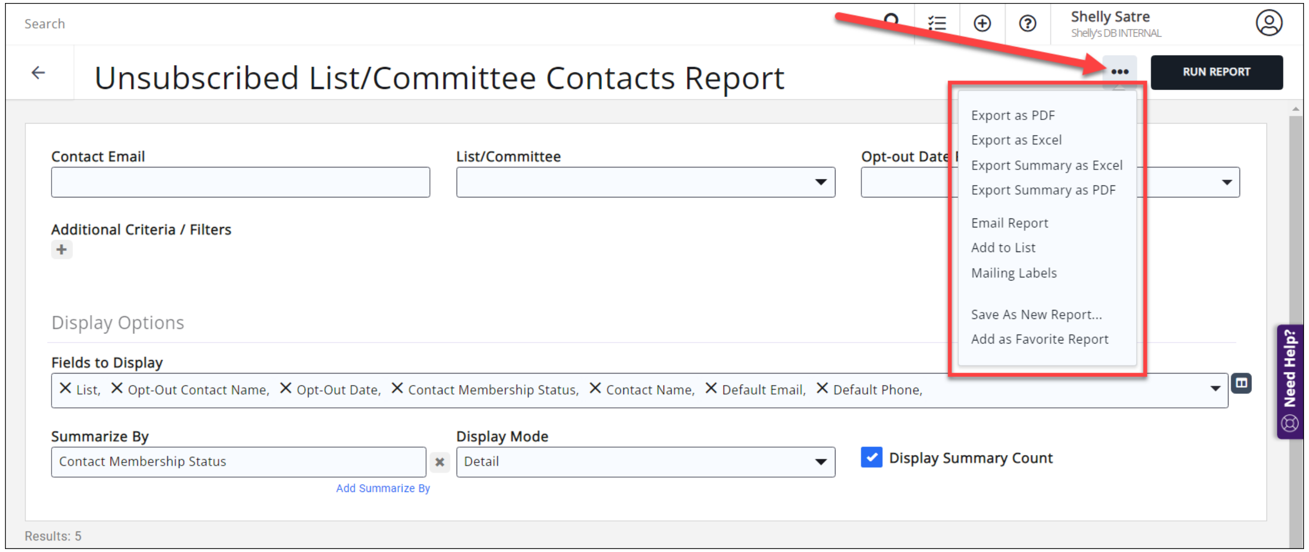
All reports may be exported to Excel or PDF and may be exported in detail or summary format.



Article: [Export Reports]

Email Reports

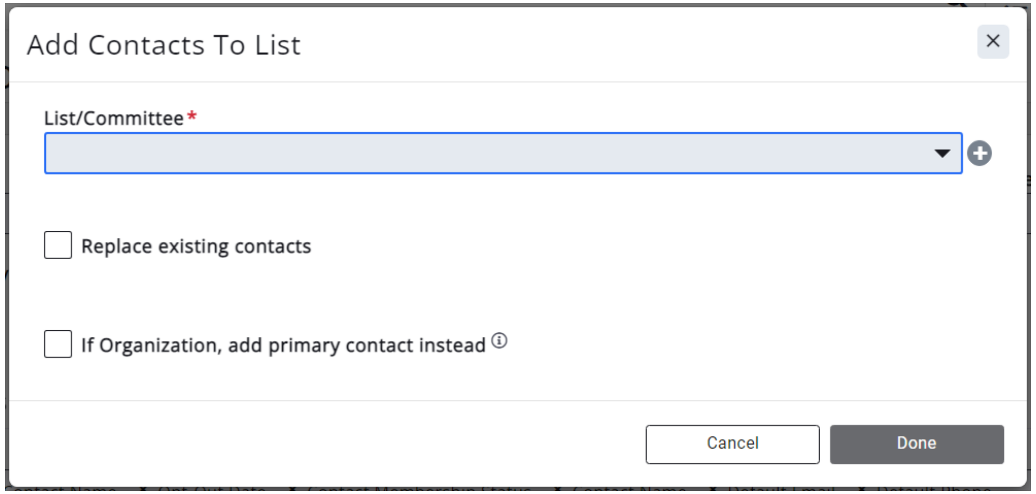
You can easily send report results via email. For example, perhaps the board would like a report of all Dropped Members. You can generate the report and email the results.



Article: Email Reports

Add to List

You can easily create a list from a report. For Example: If you wish to communicate with your dropped members, you can generate the Dropped Membership Report, and create a list.



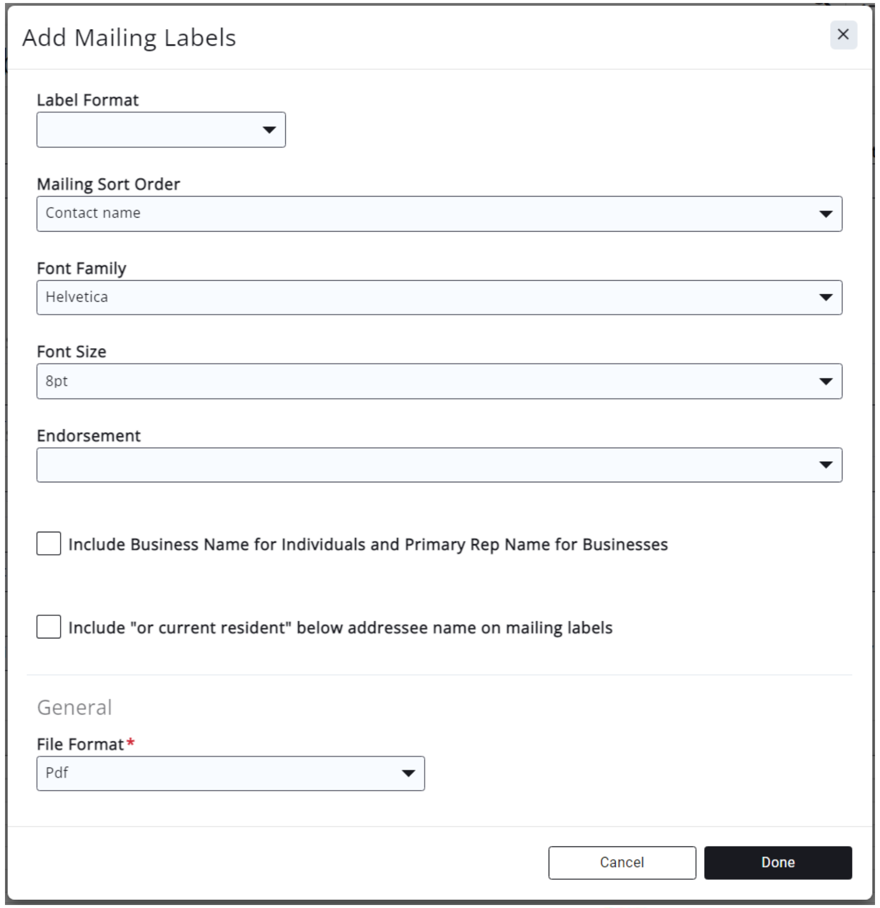
Article: [Add Report Contacts to a List/Committee]

Mailing Labels

You can create mailing labels directly from the results of your report.

The contact's address marked as **Mailing** or **Physical and Mailing** is used as a priority if available. If more than one is listed as Mailing type, it will use the one marked as **Default**. The address of the contact is used if no fall back address is available.

Article: Mailing Labels



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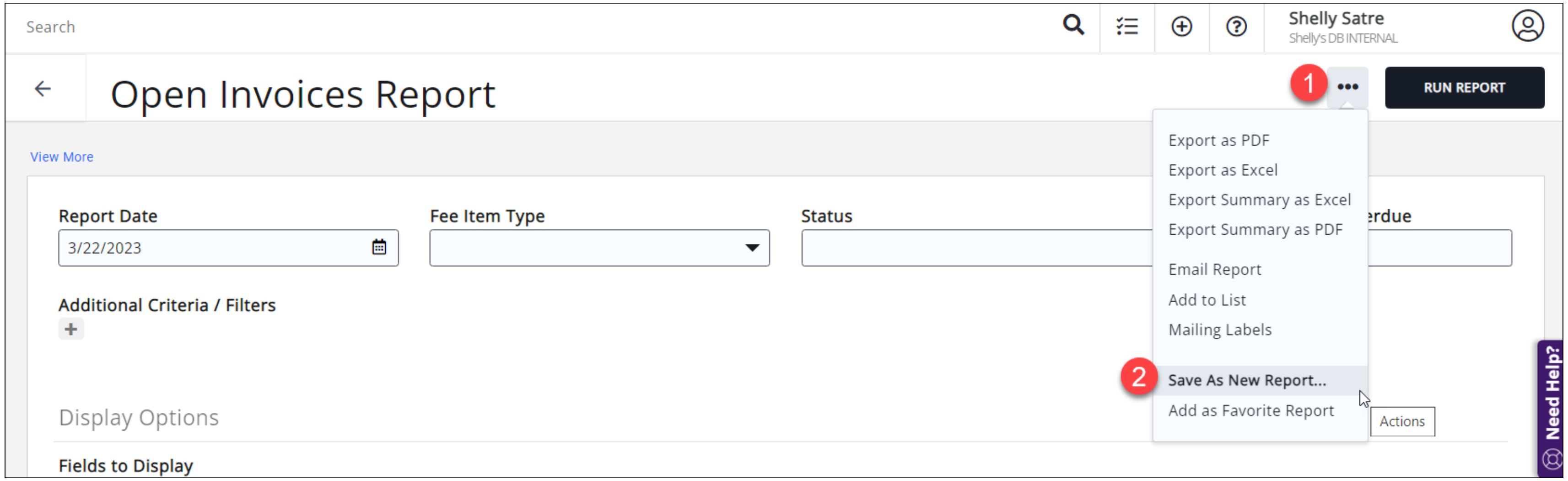
Save a Report

After customizing a report to suit your needs, you may save the report. This will save all the filters and custom settings and make it easy for you to run the report again in the future.



Article: [Save a Report]

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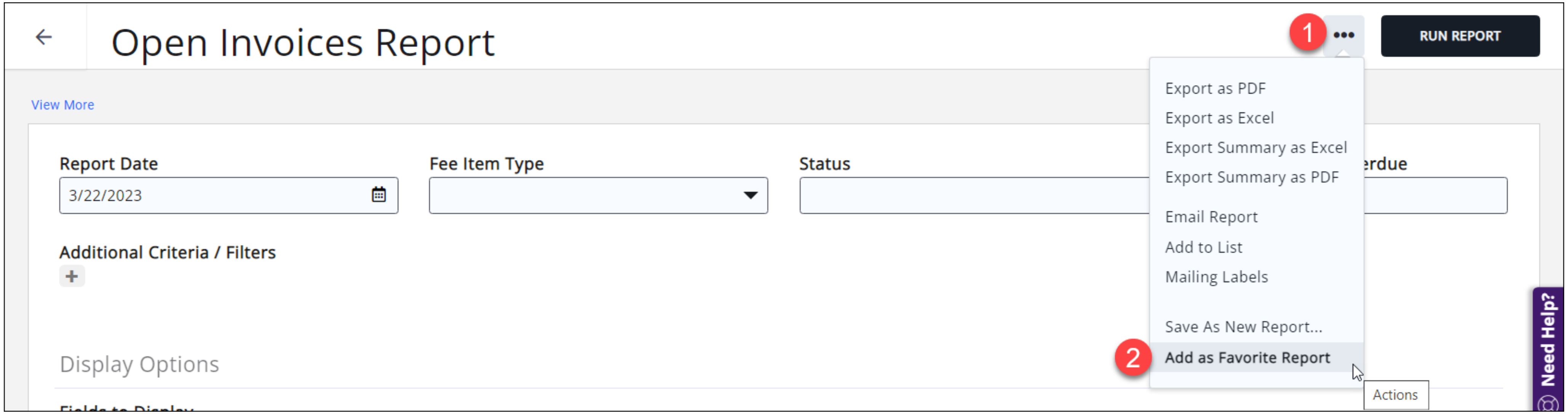
Favorite a Report

If you frequently use the same report, you can save it as a favorite. This will flag the report with a gold star icon and allow you to filter the Reports Module to it, as well as add it to the shortcuts on your Dashboard.



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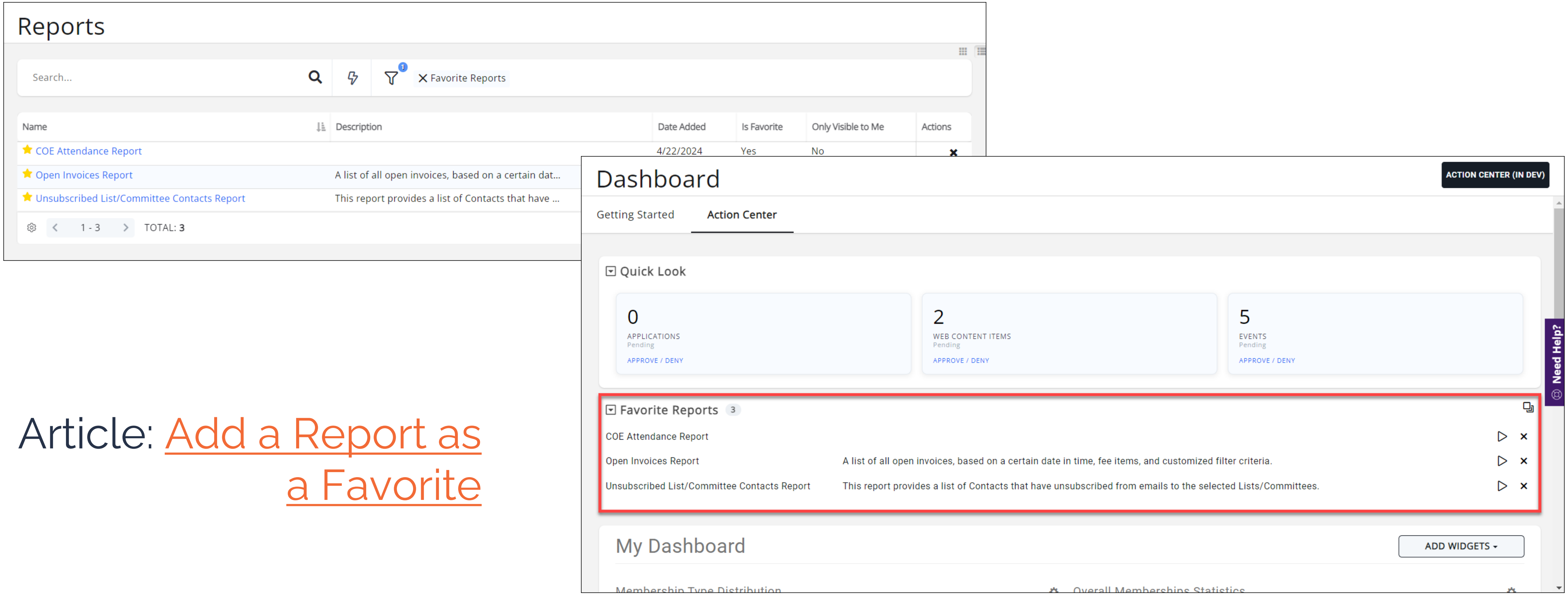
Favorite a Report



Article: [Add a Report as a Favorite]

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GENERATING REPORTS

Report Filtering Operators

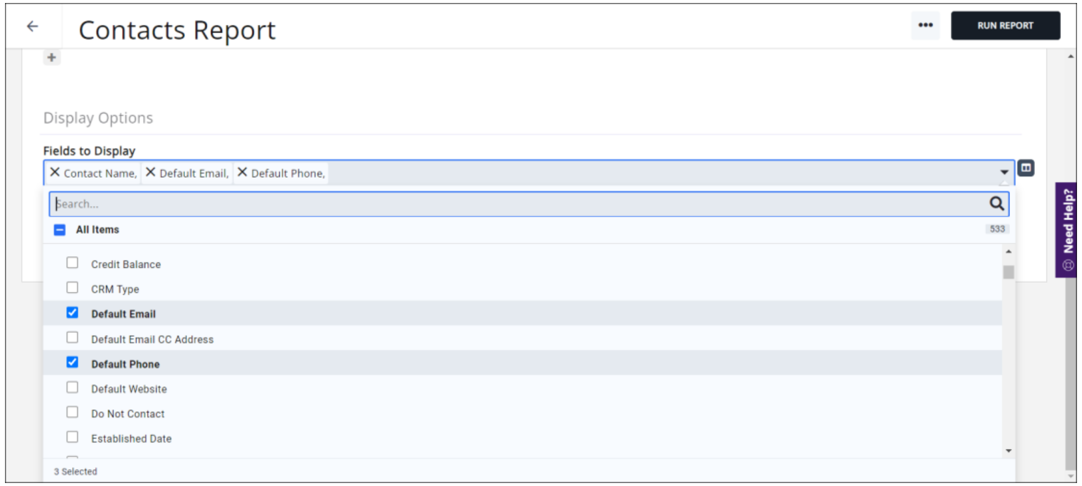
- The AND operator displays a record if ALL your filter criteria are met.
- The OR operator displays a record if ANY of the conditions are met.

In general, start your additional criteria with the largest set of results first, then apply additional filters to narrow the search. Available operators within the filters will depend on the type of data being filtered: dates, numeric or monetary values, text, etc.

Article: Report Filtering Operators

Select Report Fields to Display

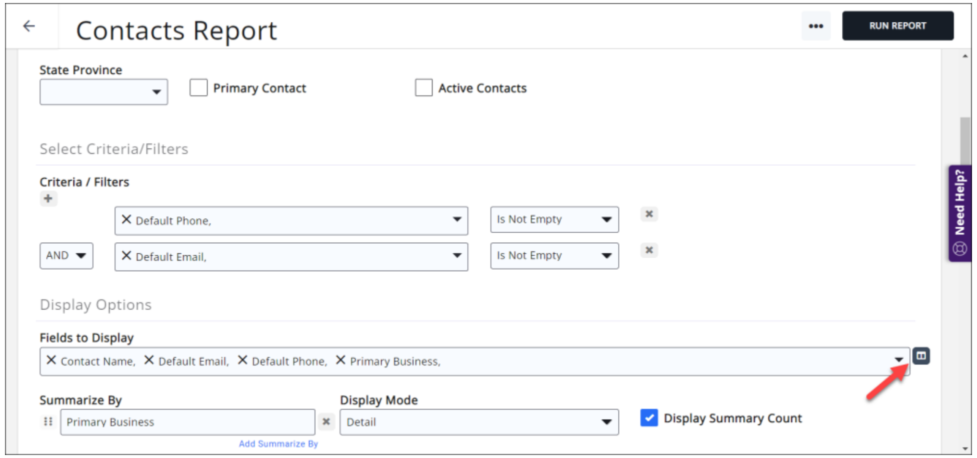
By default, reports include a default set of fields to display in the results. If you want to display a different set of fields, you can click into the Fields to Display dropdown to select and/or deselect from available default and custom fields.

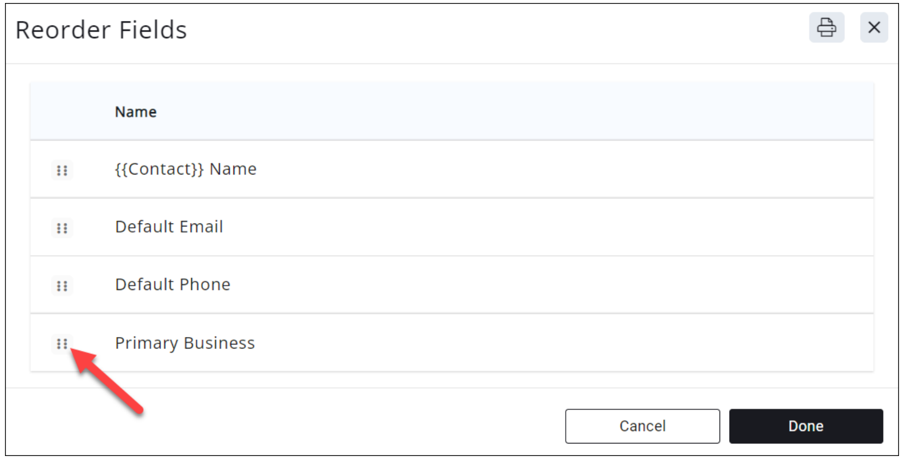


Article: [Select Report Fields to Display]()

Reorder Report Fields to Display

To change the order in which fields are displayed in your report select the icon in the Display Options section. You will then be able to drag the fields into the order you wish them displayed.





Article: [Reorder Report Fields to Display]

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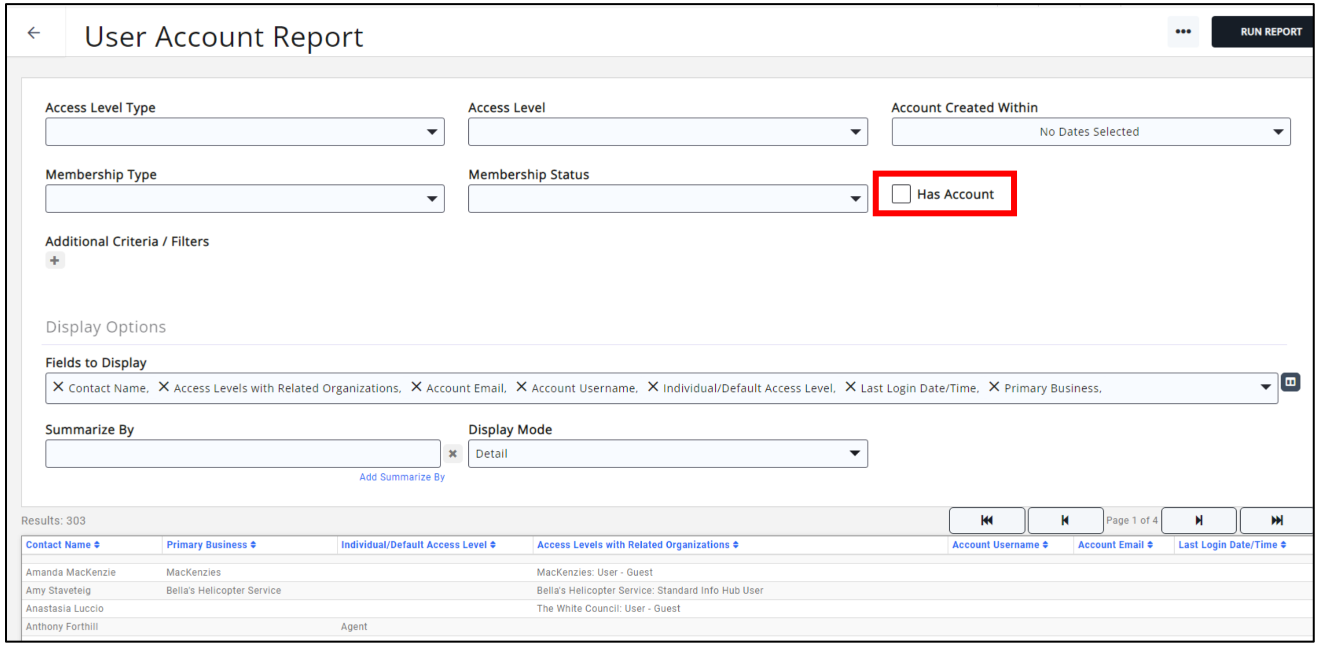
USEFUL REPORTS

User Account Report

If you'd like to set up a marketing automation workflow to encourage members to create their Info Hub accounts, you'll need a list of members that haven't done so.

The **User Account Report** can be used to generate a list of those members; then, we can save the report, save the results to a list, sync that list to the report, and voila! An automatically updating workflow source list that will only email those members without logins.

User Account Report



Article: User Account Report Use Case: View Contacts Who Do Not Have Login Credentials

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Contacts Report

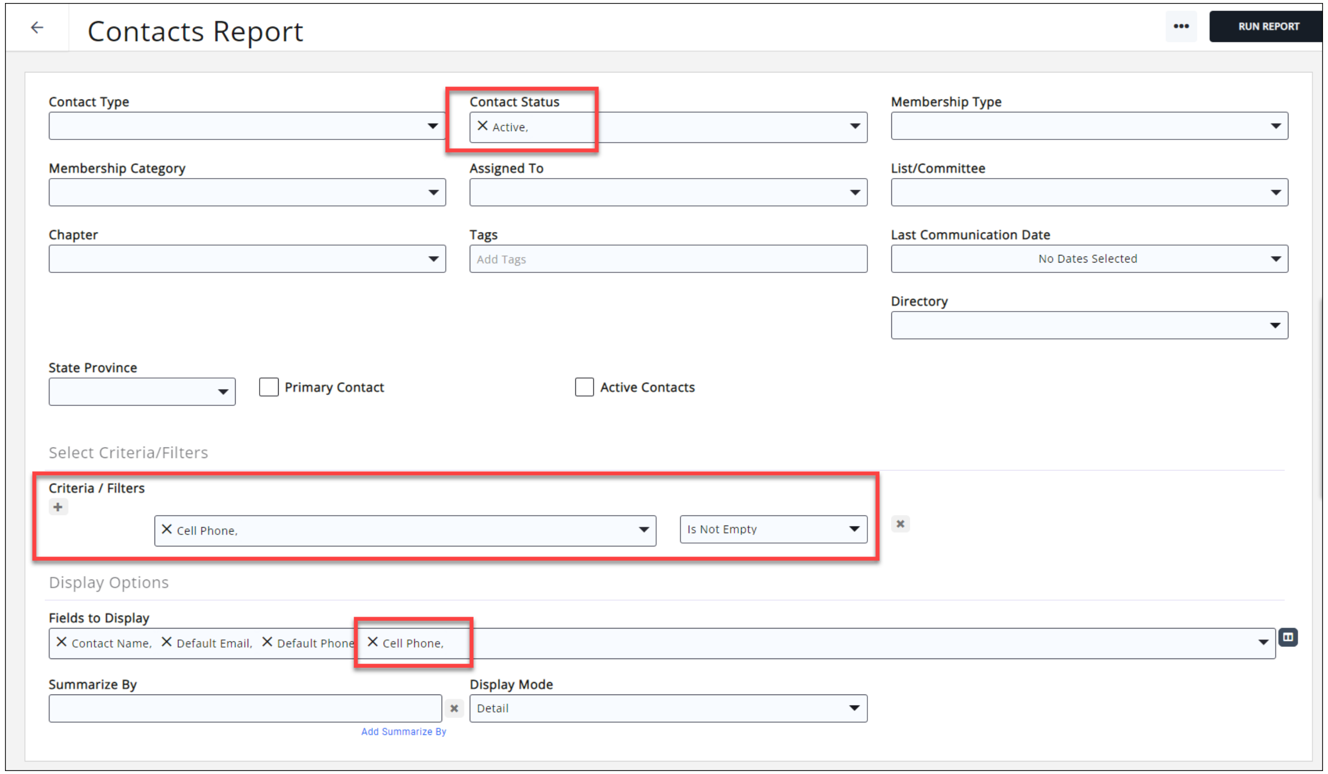
The Contacts Report is INCREDIBLY useful and has many applications.

Let's say your organization subscribes to a text messaging service, and you need to update the list of members and their cell phone numbers.

You'll want a list of all active contacts with cell phone numbers.

- Contact Status: Active
- Additional Criteria of Cell Phone Is Not Empty
- Add Cell Phone to Fields to Display

Contacts Report



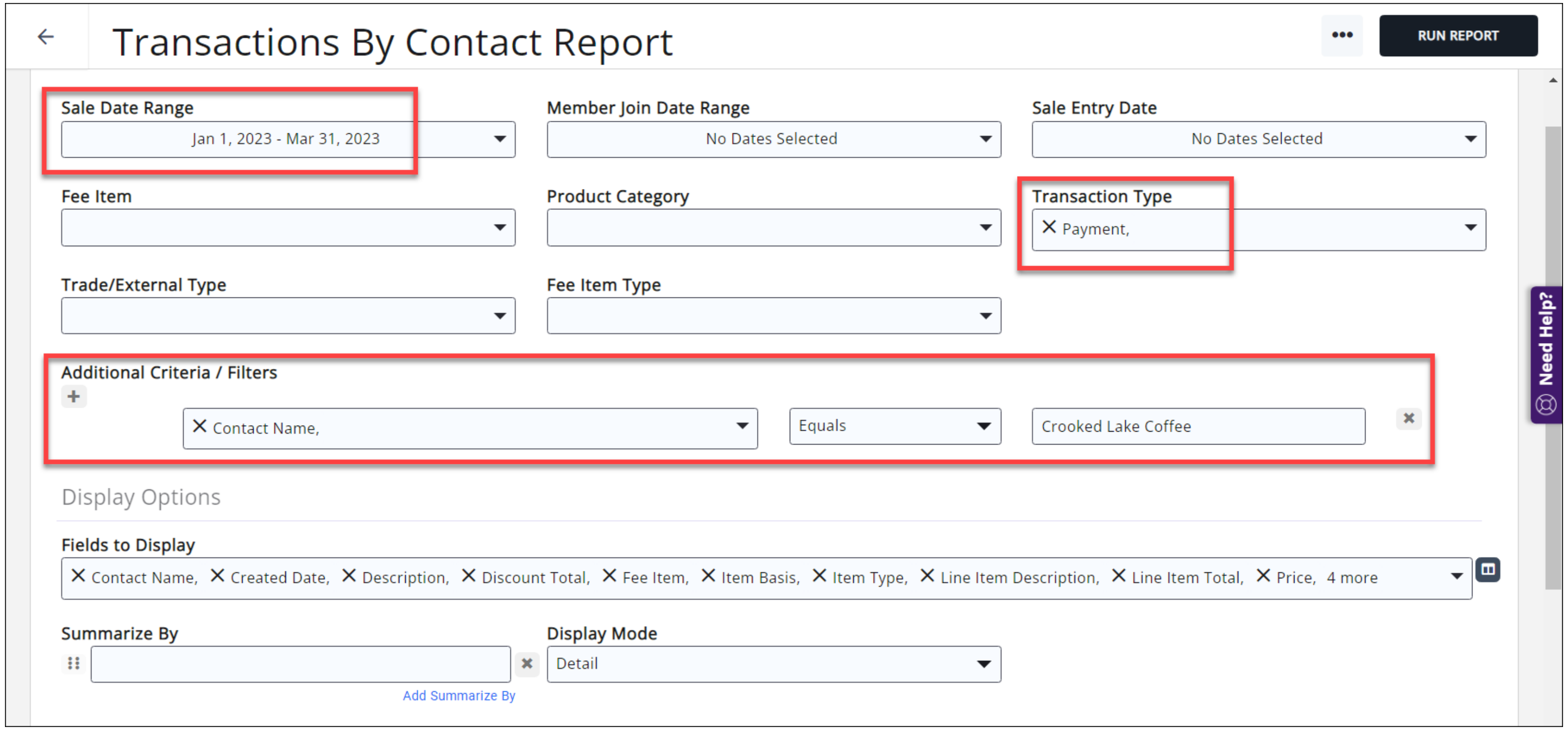
Article: [Contacts Report Use Case: View report of contacts and cell phone numbers]()

Transactions by Contact Report

Using the Transactions by Contact Report, you can display all payments received from a contact over a specific date range.

This could be helpful if a contact needs a record of all the payments they have made to you for tax purposes, or if they simply have a question on which payment they made was for what invoice or item.

Transactions by Contact Report



Article: [Use Case: Find All Payments Made By a Single Contact Over a Specific Date Range]()

THANK YOU!!!

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