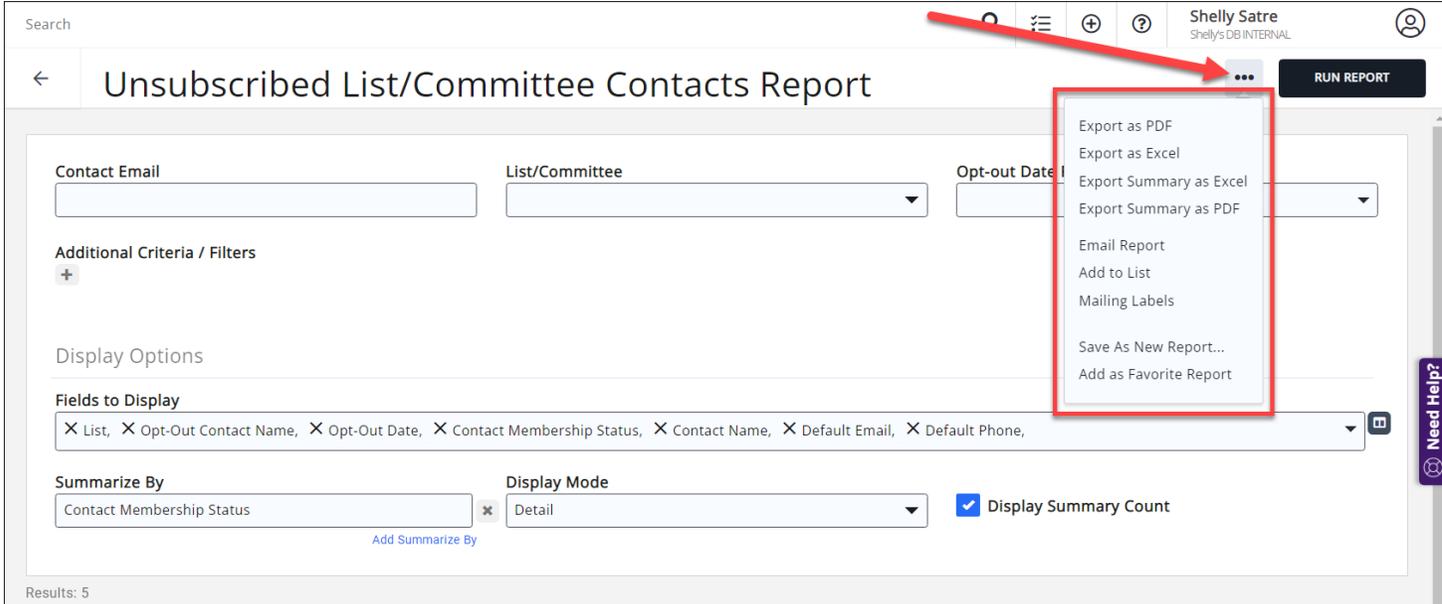


GrowthZone Classroom Training: Working with Reports

COMMON REPORT FUNCTIONS

Export Reports

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

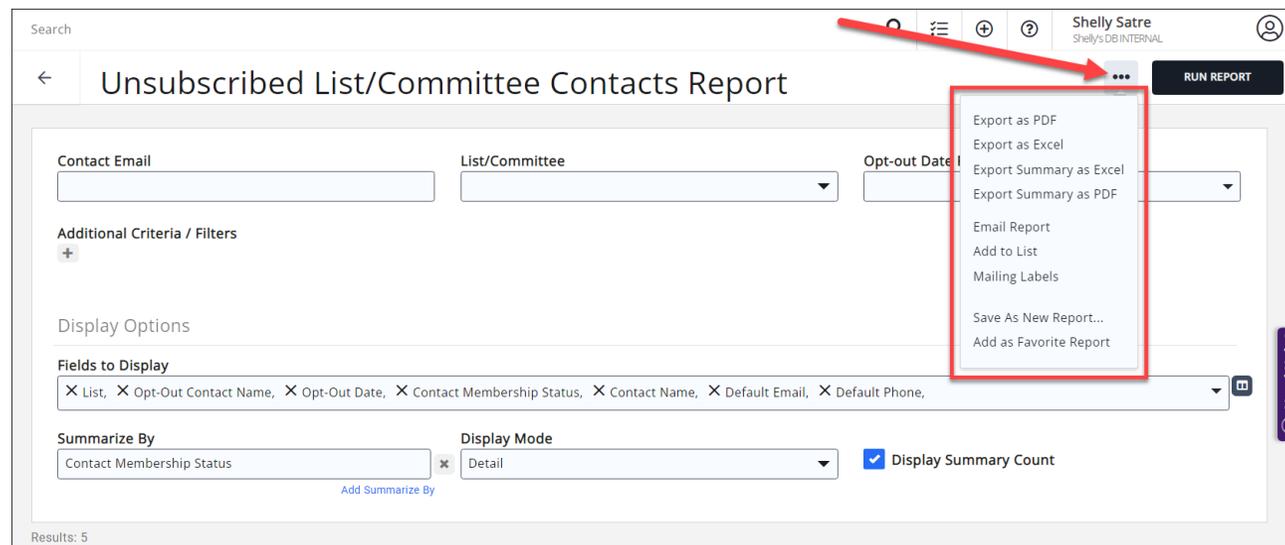


The screenshot displays the 'Unsubscribed List/Committee Contacts Report' interface. At the top right, the user 'Shelly Satre' is logged in. A red arrow points to a three-dot menu icon next to the 'RUN REPORT' button. This menu is open, showing the following options: 'Export as PDF', 'Export as Excel', 'Export Summary as Excel', 'Export Summary as PDF', 'Email Report', 'Add to List', 'Mailing Labels', 'Save As New Report...', and 'Add as Favorite Report'. The interface includes search and filter fields for 'Contact Email', 'List/Committee', and 'Opt-out Date'. It also features sections for 'Additional Criteria / Filters', 'Display Options', 'Fields to Display' (with a list of selected fields: List, Opt-Out Contact Name, Opt-Out Date, Contact Membership Status, Contact Name, Default Email, Default Phone), 'Summarize By' (set to Contact Membership Status), 'Display Mode' (set to Detail), and a checked 'Display Summary Count' option. The bottom left corner shows 'Results: 5'. A vertical 'Need Help?' button is visible on the right side of the report area.

Article: [Export Reports](#)

Email Reports

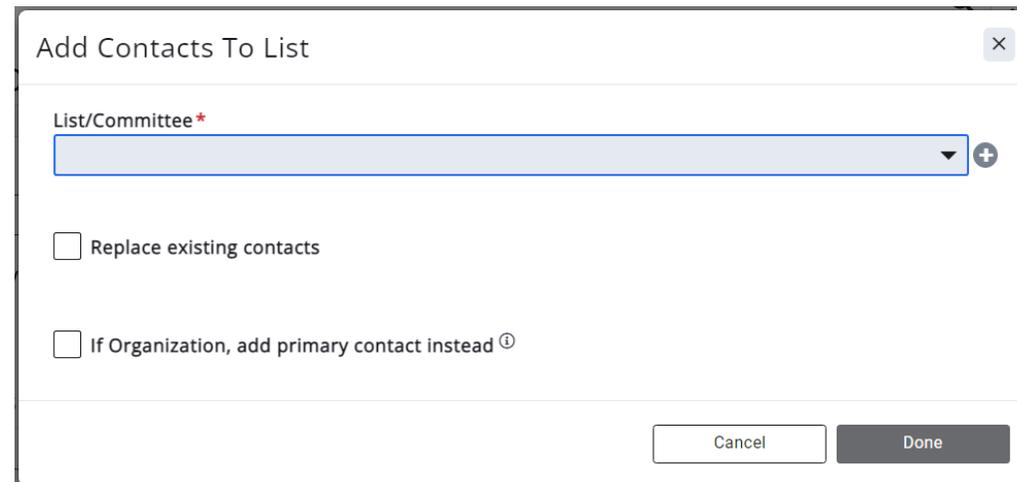
You can easily send report results via email. For example, perhaps the board would like a report of all Dropped Members. You can generate the report and email the results.



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.



The screenshot shows a dialog box titled "Add Contacts To List" with a close button (X) in the top right corner. Below the title bar, there is a dropdown menu labeled "List/Committee*" with a plus sign (+) to its right. Below the dropdown menu, there are two checkboxes: "Replace existing contacts" and "If Organization, add primary contact instead ©". At the bottom of the dialog box, there are two buttons: "Cancel" and "Done".

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](#)

Add Mailing Labels ✕

Label Format
[Dropdown]

Mailing Sort Order
Contact name [Dropdown]

Font Family
Helvetica [Dropdown]

Font Size
8pt [Dropdown]

Endorsement
[Dropdown]

Include Business Name for Individuals and Primary Rep Name for Businesses

Include "or current resident" below addressee name on mailing labels

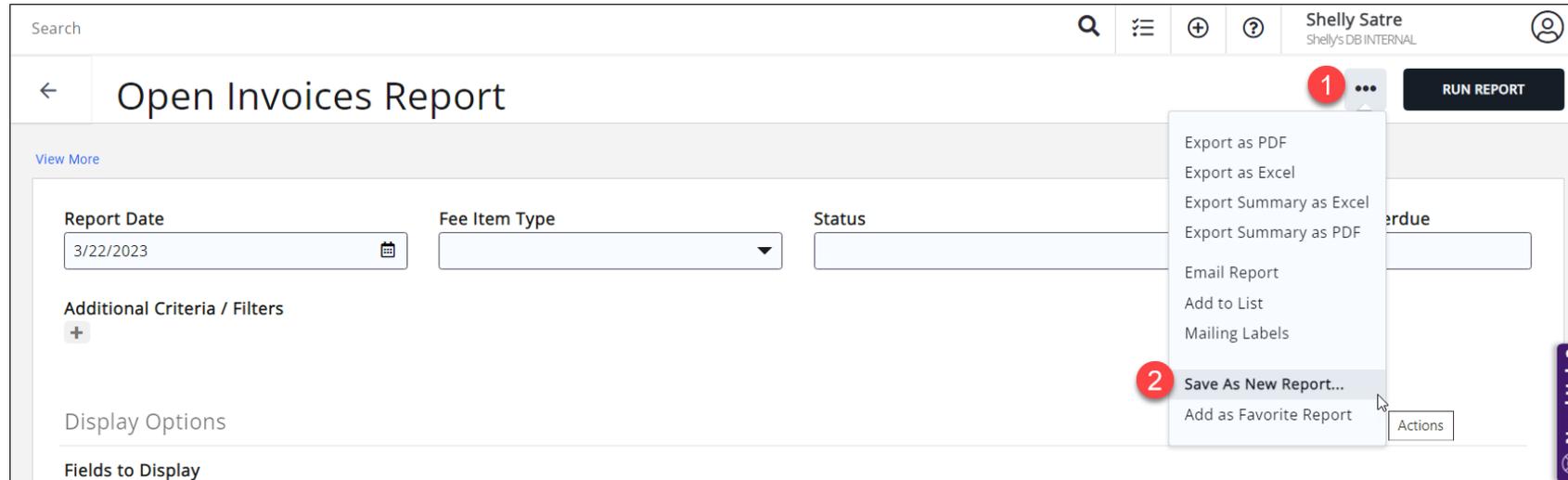
General

File Format*
Pdf [Dropdown]

Cancel Done

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](#)

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.

The screenshot displays the 'Open Invoices Report' interface. At the top, there is a back arrow, the title 'Open Invoices Report', a red circle with the number '1' next to a three-dot menu icon, and a 'RUN REPORT' button. Below the title, there is a 'View More' link. The main area contains filter fields: 'Report Date' with a date picker set to '3/22/2023', 'Fee Item Type' with a dropdown menu, and 'Status' with a text input field. Below these are sections for 'Additional Criteria / Filters' with a plus icon, and 'Display Options'. A context menu is open over the 'Actions' button, listing options: 'Export as PDF', 'Export as Excel', 'Export Summary as Excel', 'Export Summary as PDF', 'Email Report', 'Add to List', 'Mailing Labels', 'Save As New Report...', and 'Add as Favorite Report'. A red circle with the number '2' is placed over the 'Add as Favorite Report' option. A vertical 'Need Help?' button is visible on the right side of the interface.

Favorite a Report

Reports

Search... Favorite Reports

Name	Description	Date Added	Is Favorite	Only Visible to Me	Actions
★ COE Attendance Report		4/22/2024	Yes	No	
★ Open Invoices Report	A list of all open invoices, based on a certain dat...				
★ Unsubscribed List/Committee Contacts Report	This report provides a list of Contacts that have ...				

< 1 - 3 > TOTAL: 3

Dashboard ACTION CENTER (IN DEV)

Getting Started Action Center

Quick Look

- 0 APPLICATIONS Pending APPROVE / DENY
- 2 WEB CONTENT ITEMS Pending APPROVE / DENY
- 5 EVENTS Pending APPROVE / DENY

Favorite Reports 3

COE Attendance Report			
Open Invoices Report	A list of all open invoices, based on a certain date in time, fee items, and customized filter criteria.		
Unsubscribed List/Committee Contacts Report	This report provides a list of Contacts that have unsubscribed from emails to the selected Lists/Committees.		

My Dashboard ADD WIDGETS

Membership Type Distribution Overall Memberships Statistics

Article: [Add a Report as a Favorite](#)

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.

Select Criteria/Filters

Criteria / Filters

+

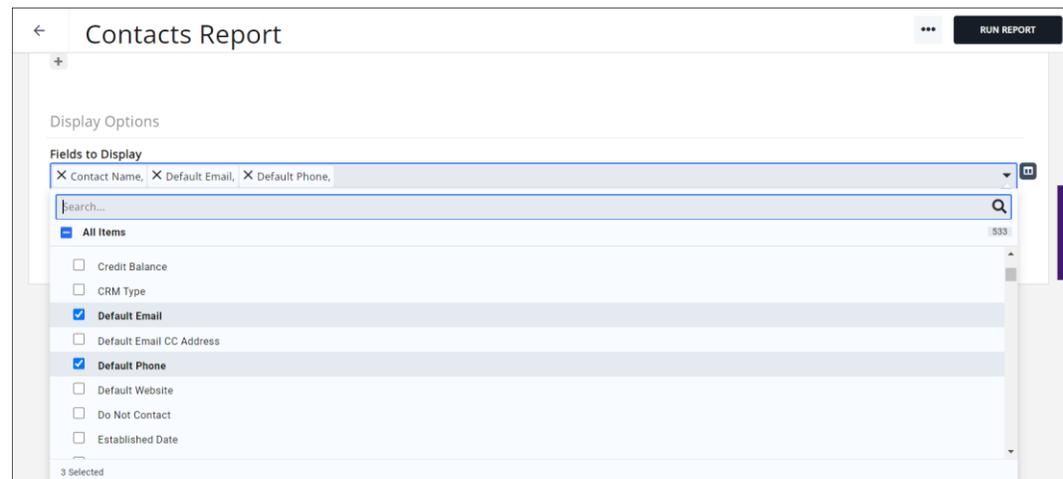
AND

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

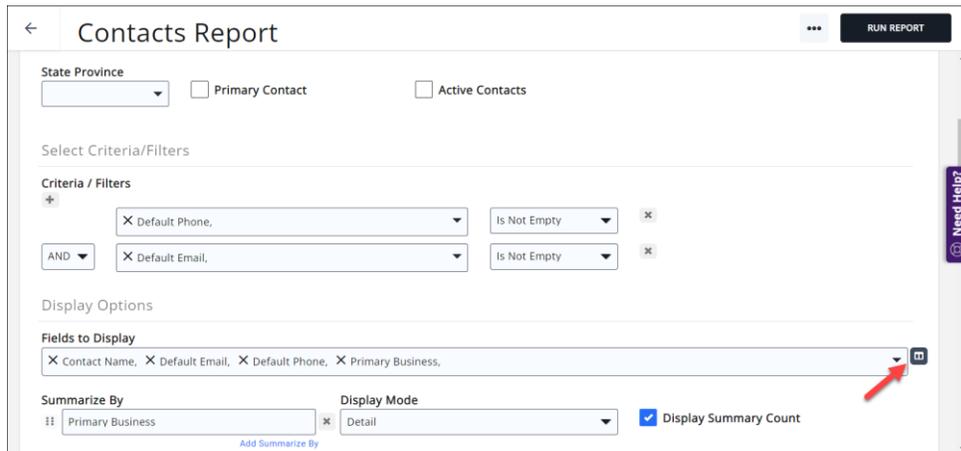
By default, reports include a default set of fields to display in the results. If you want to display a different set of fields, you can click into the Fields to Display dropdown to select and/or deselect from available default and custom fields.



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.



Contacts Report

State Province: [Dropdown] Primary Contact Active Contacts

Select Criteria/Filters

Criteria / Filters

- X Default Phone, [Dropdown] Is Not Empty [Dropdown] X
- AND X Default Email, [Dropdown] Is Not Empty [Dropdown] X

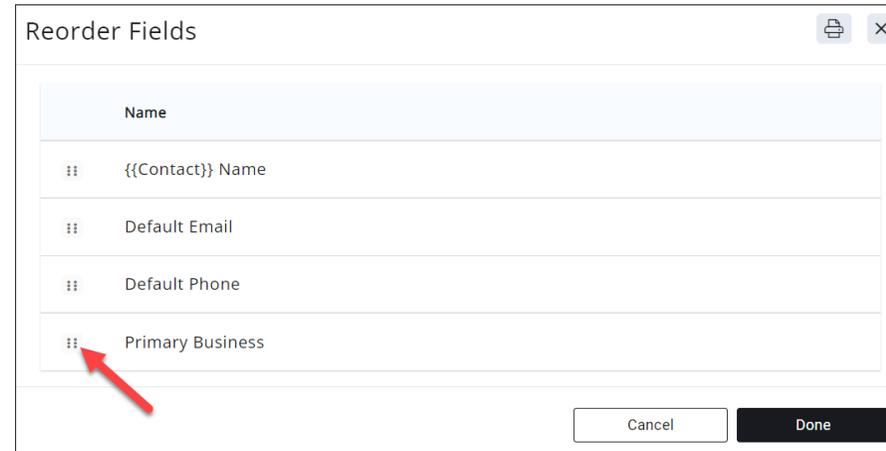
Display Options

Fields to Display

X Contact Name, X Default Email, X Default Phone, X Primary Business

Summarize By: [Dropdown] Primary Business Display Summary Count

Display Mode: [Dropdown] Detail



Reorder Fields

Name
[[{{Contact}} Name
Default Email
Default Phone
Primary Business

Cancel Done

Article: [Reorder Report Fields to Display](#)

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

← User Account Report ... **RUN REPORT**

Access Level Type: [Dropdown] Access Level: [Dropdown] Account Created Within: [Dropdown - No Dates Selected]

Membership Type: [Dropdown] Membership Status: [Dropdown] Has Account

Additional Criteria / Filters: +

Display Options

Fields to Display: [Dropdown - X Contact Name, X Access Levels with Related Organizations, X Account Email, X Account Username, X Individual/Default Access Level, X Last Login Date/Time, X Primary Business]

Summarize By: [Dropdown] * Display Mode: [Dropdown - Detail]

Results: 303 ⏪ ⏩ Page 1 of 4 ⏪ ⏩

Contact Name	Primary Business	Individual/Default Access Level	Access Levels with Related Organizations	Account Username	Account Email	Last Login Date/Time
Amanda MacKenzie	Mackenzies		Mackenzies: User - Guest			
Amy Stavetelig	Bella's Helicopter Service		Bella's Helicopter Service: Standard Info Hub User			
Anastasia Luccio			The White Council: User - Guest			
Anthony Forthill		Agent				

Article: [User Account Report Use Case: View Contacts Who Do Not Have Login Credentials](#)

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

The screenshot shows the 'Contacts Report' interface. At the top right, there is a 'RUN REPORT' button. The main area contains several filter sections:

- Contact Type:** A dropdown menu.
- Contact Status:** A dropdown menu with 'Active' selected. This section is highlighted with a red box.
- Membership Type:** A dropdown menu.
- Membership Category:** A dropdown menu.
- Assigned To:** A dropdown menu.
- List/Committee:** A dropdown menu.
- Chapter:** A dropdown menu.
- Tags:** A text input field with 'Add Tags'.
- Last Communication Date:** A dropdown menu with 'No Dates Selected'.
- Directory:** A dropdown menu.
- State Province:** A dropdown menu.
- Primary Contact:** A checkbox.
- Active Contacts:** A checkbox.

Below these filters is the 'Select Criteria/Filters' section, which is highlighted with a red box. It contains a 'Criteria / Filters' section with a plus sign and a list of filters: 'Cell Phone' and 'Is Not Empty'.

Below that is the 'Display Options' section, which is also highlighted with a red box. It contains a 'Fields to Display' section with a list of fields: 'Contact Name', 'Default Email', 'Default Phone', and 'Cell Phone'.

At the bottom, there is a 'Summarize By' section with a text input field and an 'Add Summarize By' link, and a 'Display Mode' dropdown menu set to 'Detail'.

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

The screenshot shows the 'Transactions By Contact Report' interface. The title bar includes a back arrow, the report name, a menu icon, and a 'RUN REPORT' button. The main area contains several filter sections:

- Sale Date Range:** A dropdown menu with the selected range 'Jan 1, 2023 - Mar 31, 2023'.
- Member Join Date Range:** A dropdown menu with 'No Dates Selected'.
- Sale Entry Date:** A dropdown menu with 'No Dates Selected'.
- Fee Item:** An empty dropdown menu.
- Product Category:** An empty dropdown menu.
- Transaction Type:** A dropdown menu with 'Payment' selected.
- Trade/External Type:** An empty dropdown menu.
- Fee Item Type:** An empty dropdown menu.
- Additional Criteria / Filters:** A section containing a filter for 'Contact Name' with the value 'Crooked Lake Coffee' and an 'Equals' operator.
- Display Options:** A section for 'Fields to Display' with a list of fields including 'Contact Name', 'Created Date', 'Description', 'Discount Total', 'Fee Item', 'Item Basis', 'Item Type', 'Line Item Description', 'Line Item Total', 'Price', and '4 more'.
- Summarize By:** A dropdown menu with an 'Add Summarize By' link below it.
- Display Mode:** A dropdown menu with 'Detail' selected.

A vertical 'Need Help?' button is located on the right side of the interface.

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

THANK YOU!!!