

Introduction to Reports



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Our session includes . . .

- View predefined membership reports
- Download/Export data
- Create member directory listing
- Ensure member data is up-to-date
- See who is most 'engaged'
- Use custom report
- [Reports and Downloads](#) in **Help/Info**
- 1 hour

Please remember. . .

- Please ask questions throughout!
 - Send questions, comments, feedback on the GotoWebinar Questions area anytime
- Q&A time at the end
 - If you are connected via voice line, you'll be able to ask question verbally
 - Click Raise Hand; wait to be recognized; ask question; all participants will hear question
 - May also converse privately through Q&A in Questions area

Report selection

Report Finder

1 Search by Keyword 2

labels

Search by Category

Popular / Frequently Used
Recent
Featured
Recently Added


Or select your category

Membership (44)
Advertising (6)
Billing (40)
Events (13)
Information Request (12)
Job Postings (1)
Website Statistics (22)


Reports

Keyword: 'labels', Found 2

Event Nametags With Logos [SR] [Edit](#) ▶ 3

 This report allows you to generate nametags for the registered attendees of your events. Running the report will prompt you to select an event. Note: only events that have not ended will be available to choose from. You must export the nametags to a PDF or other 'Print-Ready' format to print them correctly. The template is designed to work with Avery name badge labels 5395, 8395, 45395, 42395, 48395 15395, 42995, and 25395. (2-1/4" x 3-1/2" sized tags, 8 per page)

Mailing Labels [Edit](#) ▶

 Generates mailing labels for members or their representatives

Report Finder

Search by Keyword

1
join

2
Search

Search by Category

[Popular / Frequently Used](#)

[Recent](#)

[Featured](#)

[Recently Added](#)

[Membership \(35\)](#)

[Advertising \(6\)](#)

[Billing \(37\)](#)

[Events \(9\)](#)

[Information Request \(9\)](#)

[Job Postings \(1\)](#)

[Website Statistics \(19\)](#)

[Member Marketing \(5\)](#)

Reports

Keyword: 'join', Found 1



Member Listing by Join Date

Displays summary or detail member information based on their join date. Optionally show fees.

3

Filter Options

Join Date: from: 7/1/2012 use this month
to: 7/31/2012

Include recurring **member fees/dues** in output for *Detailed Listing* reports.

Include **totals** summary at bottom of report.

Show **Active** members only.

[View/Print Summary Listing](#)

[Download Summary Listing](#)

[View/Print Detail Listing](#)

[Download Detailed Listing](#)

- See a list of members based on join date
- Note: To see a total at the bottom and assigned \$\$ amounts, check the boxes and View Detailed Report

Download Data

- Click Download
- Save the file to desired location
- A copy of the data is placed in this file
- Use it for
 - Emailing as an attachment to others
 - Viewing/manipulating in MS Excel
 - Bring into MS Word thru mail merge
 - Hint: For mail merge instructions search for mail merge in Help/Info
 - Save for historical purposes

Member Drop reports



Report Finder

Search by Keyword

drop

Search by Category

[Popular / Frequently Used](#)
[Recent](#)
[Featured](#)
[Recently Added](#)

Membership (35)
[Advertising \(6\)](#)
[Billing \(37\)](#)
[Events \(9\)](#)
[Information Request \(9\)](#)
[Job Postings \(1\)](#)
[Website Statistics \(19\)](#)
[Member Marketing \(5\)](#)

Reports

Keyword: 'drop', Found 2



Membership Drop Analysis 
Displays statistics about growth and drops over a time range

Member Listing by Drop Date 
Displays summary or detail member information based on their join date. Optionally show fees.

- Membership Drop Analysis – use for calling dropped members; includes sales rep and drop reasons
 - Hint: Download the list to see phone numbers/emails



Combination reports

- Member Retention Summary


**Member Retention Summary** 

Charts of various membership statistics for the last year; valuable for executive reports

- Membership Trends



**Membership Trends** 

Displays a chart of the number of members for a given status over time. Either in a chart or table.

Membership Trends; Graph & Table [SR] 

Displays a graph of membership across a specified date range and displays a table showing the data used to build the chart. The table shows membership levels by month making it possible to see how many members you had on a certain month in a given year. Print in Landscape. Health Data columns marked with an *, Web Participation Gold and Active Banners, will only populate with data for those with the Marketing Package or running a Member Benefit Campaign.

- Member Growth Report

**Membership Growth Report** 

Displays statistics about growth and drops over a time range

Membership Directory



Printable Membership Directory [SR]

A simple directory designed to be printed. To print as a booklet requires a printer capable of duplex booklet printing. Export the report to a PDF file and open the file. In print settings, choose landscape as the orientation. Set your printer to its duplex booklet printing option and choose "Open to Right" for the booklet binding. For best results set "Page Scaling" to 'Fit to Printable Area'. The title lines and subtitle lines are customizable, includes chamber logo on the cover and member logos where available.

Three-Column Printable Membership Directory [SR]

A membership directory in two-column format with the options for choosing what member information is displayed. Members who have "Does Not Display On Web" Selected in their Web Participation Options do not get included in this directory. Export to a PDF file for best printing.

Two-Column Printable Membership Directory [SR]

A membership directory in two-column format with the options for choosing what member information is displayed and optional member logos. Members who have "Does Not Display On Web" Selected in their Web Participation Options do not get included in this directory. Export to a PDF file for best printing.

Member Directory Report



Allows you to build a custom membership list, alphabetically or by category, show/hide courtesy members, etc. Good starting point for building a printed directory.

Member Directory with Logos [SR]




Simple member directory listing of all active members only. Your organization logo will display at the top of the report if loaded at Setup>Organization information. Member logos will display only with the Marketing Package or if running a Member Benefit Campaign. Those logos are loaded under Members>Web tab>Search results icon.

- Upload your logo under **Setup->Organization** information
- Customer logos only available with the Marketing Package add-on

Member Longevity


- Based on Join date



Member Longevity [SR] ▶

A list of members and how long they have been with the your organization, sorted by longevity.

- 1/1/0001 means join date is blank



Member Longevity Report


Generated 7/25/2012 9:33:32 AM
From Database CM_DEMO_016

Name	Join Date	Years	Months	Days	Total Days
NCTC	1/1/0001				
Kelly Kruize	1/1/0001				
Lakeland Bank - Main office	1/1/0001				
Lakeland Bank - Riverview	1/1/0001				
Green Valley Hair Salon	1/1/0001				
Tom Thumb Convenience Store	5/13/1987	25	2	12	9205
W & S, Inc.	9/15/1987	24	10	10	9080
Zales Jewelers	7/8/1988	24	0	17	8783
WW Thompson Concrete Products	7/11/1988	24	0	14	8780
Clear Vision	7/11/1988	24	0	14	8780
Harmony Real Estate and Appraisal Service	7/13/1988	24	0	12	8778
Tile Lake Campground	7/18/1988	24	0	7	8773
Big Dogs	7/26/1988	24	-1	1	8765
Mark's Building Supplies, Inc.	9/9/1988	23	10	16	8720
Perkins Family Restaurant and Bakery	5/5/1989	23	2	20	8482
Ace Hardware Plus	2/21/1991	21	5	4	7825



Encourage Members to Update

- Send current info via email with login/password to portal
 - Communication->Send eMail to Multiple Members, select Pre-Defined Template: Update Your Business Directory Listing







Member Information Survey

Creates forms with member information that they can then edit/correct and return to your organization. Can be printed or individually sent to each contact via email or fax.

- Member Info Survey
 - has variety of options
 - select recipients by Renewal date
 - Email or print

Need Info on a Single member?

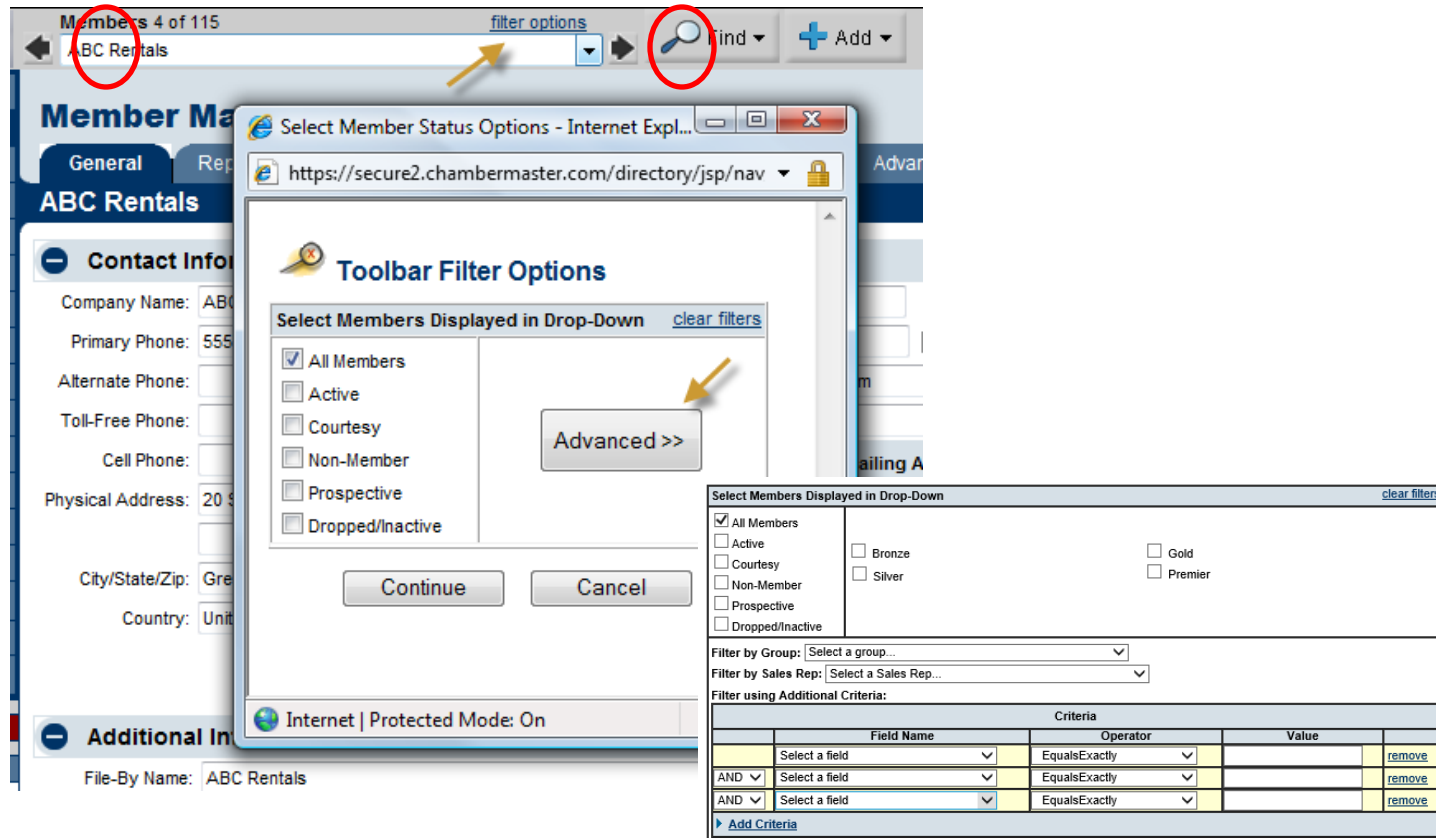
- Members->Stats tab*
 - Member Benefit report
 - Member Profile report
- *Can send Member Benefit or Member Profile report to all/selected members

	Member Benefit Batch Print or Email 
	Allows you to print or email the Member Benefit report across a group of members or by renewal month
	Member Profile Batch Print or Email 
	Allows you to print or email the Member Profile report across a group of members or by renewal month

Focus on Targeted Members

- Use Advanced Filter to concentrate on selected members

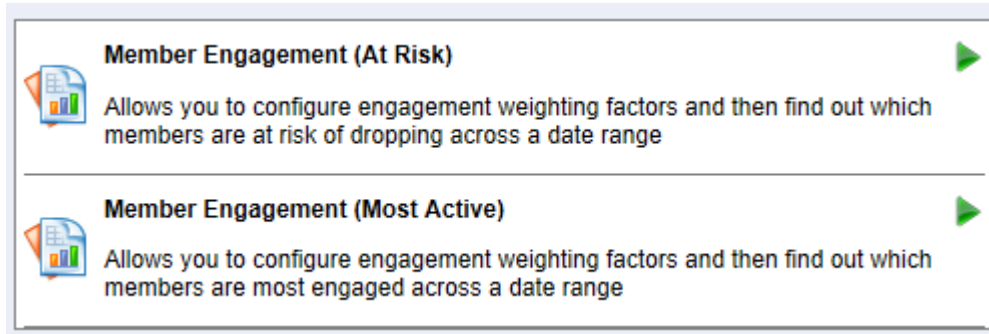
Hint: After filtering, use the black right and left arrow to move between selected members.



The screenshot shows a web application interface for member management. At the top, there is a search bar with a magnifying glass icon circled in red. Below it, a 'filter options' button is also circled in red. A dialog box titled 'Select Member Status Options' is open, showing a list of member statuses: All Members (checked), Active, Courtesy, Non-Member, Prospective, and Dropped/Inactive. An 'Advanced >>' button is highlighted with a yellow arrow. Below the dialog, a detailed 'Select Members Displayed in Drop-Down' window is shown, which includes a table for 'Filter using Additional Criteria'.

		Criteria			
	Field Name	Operator	Value		
	Select a field	EqualsExactly			remove
AND	Select a field	EqualsExactly			remove
AND	Select a field	EqualsExactly			remove





Engagement Reports



- Find your most active members or at risk members based on your determination
- Adjust factors to meet your personal determination of “engagement”

Custom Reports

- Select desired fields
- Select which members should be displayed
- Use custom criteria (optional)
- View, print, and/or download information

	Custom Member Report 
Allows creation of a custom membership report. Select your own fields/columns, sorting, criteria, etc.	
	Custom Representative Report 
Allows creation of a custom representative report. Select your own fields/columns, sorting, criteria, etc.	

Custom Reports (cont)

- Use Custom Report to create custom groups
- Select your custom criteria; view report; then click Create a group
- Select which reps to include
- Use this custom group to send emails, print labels or save for later use

Custom Reports (cont)

- Use Table-style or List-style view
- Create your own custom view (optional)
- Save all selections to use again another time
- Saving only saves selections; data is fresh and current every time the report is run



Questions or Assistance?

Click [Request Support](#)

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