

## Reporting Breakdown

### Contact Center Report:

The Contact Center Report is designed to deliver real-time analytic results from your contact center communications. It is a great opportunity to get both a summary and detail view of what has occurred with your message once it is sent. The five areas you will receive information on are as follows.

1. Successful sends
2. Bounces
3. Opens
4. Click-thrus
5. Unsubscribes

This report is exportable into a pdf. Format. Please see a screenshot below of the summary view:

» Reporting - Contact Center  Export as PDF

### Message Properties

**Contact method:** Send E-mail  
**Reply name:** Demo Administrator  
**Reply email address:** support@memberclicks.com  
**Bcc:**  
**Subject:** Example  
**Created:** 10/02/2008 11:45:03 AM EDT  
**Send Complete:** 10/02/2008 11:45:10 AM EDT  
**Message options:** Send as HTML  
**Message body:** [Click here to view the message](#)  
**Attachments:**

### Message Recipient Details

View recipient details for your message by clicking the number to the left of the message status.

**Message Status**

<a href="#">45</a>	Complete - Email Sent From MemberClicks
<a href="#">15</a>	Message Not Sent - Check Message Information

### Message Statistics

**Total Recipients:** [60](#)  
**Opens:** [1](#)  
**Bounces:** [15](#)  
**Click-Thrus:** Total: 0  
**Unsubscribes:** 0

## Why would I use this report?

*The Contact Center Reporting allows for you to get a great handle on how effective your communications truly are. Moreover it acts as an easy step to cleaning up your database profiles. As your bounce report comes back take the opportunity to update your profiles with good information or to remove dead weight.*

### **Member Summary Report:**

In the Member Summary Report you have the capability of searching both database and form values to bring back results. The three areas you can report on in the Member Summary area are expirations, renewals, and profile additions. Each of the three report functions are detailed below with examples attached.

### **Profiles expiring in a date range by group:**

This report allows you to pull from your database all profiles that meet a certain date range in regards to their expiration date. Very simply put you can quickly access everyone that is expiring on a certain date or date range. Here is what that looks like.

**First you would set your report parameters or as we refer to them the report details.**

#### Enter report details

**Report Title:**

**Select Dates:**  ▼

**from:**  **to:**   
(MM/DD/YYYY) (MM/DD/YYYY)

**Expiration Date Attribute:**  ▼



**The next step is to review the details to ensure that the criteria you have chosen are accurate.**

## Review Details

Review the details of your report below.

**Report Type:** Member Summary Report  [Edit](#)

**Report Criteria:** Profiles expiring in a date range by group  [Edit](#)

**Report Details:**  [Edit](#)

Report Title: Expirations in May  
Date Range: 05/01/2008 - 05/31/2008  
Expiration Date Attribute: Expiration Date



Once you have reviewed the details simply click submit to obtain your results.

[← Report Details](#)

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## Expirations in May

Associate Member	Expiration Date
	05/15/2008

Associate Member Totals [7](#) / [44](#)

Board Member	Expiration Date
	05/15/2008

Board Member Totals [1](#) / [6](#)

Professional	Expiration Date
	05/15/2008

Professional Member [1](#) / [4](#)

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Total Profiles: [9](#) / [54](#)

Now you will notice in the above results page you have several action items available to you.

1. You have the ability to save this report. When you save a report it will save the criteria not the results. So in this example the criteria are all expirations in this month. If I save this report and come back in June and click my saved report that will produce June's expirations.
2. You can also export the report to either a PDF or an Excel file.

3. Also on each of the breakdowns you can see that you are able to click to the profiles that meet your criteria.

### **Why would I use this report?**

*There are several applications for this report. It is a great tool to utilize in tandem with our dues renewal notice functionality. You can quickly access, communicate and export all the profiles that are on the verge of expiring. Moreover, you can send out more targeted and personal communications to encourage renewals.*

**Quick Tip:** *Make sure you are using the MemberClicks Expiration date functionality. This allows you to automate dues renewal notices, drive people to the dues form, and automate the inactivation process!*

### **Recently Added Profiles Report**

The next report that you are able to run is the Recently Added Profiles Report. In this report you will be able to bring back all of the profiles that have been added to your system regardless of their input type. The first two steps in generating this report are exactly the same as the above report with one addition. You will now have the ability to choose how you want your results sorted. The page below will follow your report details selection.

#### **Choose sorting method**

Choose how you would like to organize and sort your results

- Sort by:
- Group
  - City
  - State
  - Zip



Once you choose your sorting option it will take you to the details review page. Simply click submit and it will return your results as seen below. You will notice the profiles are listed individually. This report is displaying all the profiles that have been added to the database whether by an upload, manual entry, membership application, or any form that requires validation such as an event registration.



## Monthly Profile Additions

Associate Member	Name	Email Address	Created Date
	<a href="#">Eric Green</a>	eric@memberclicks.com	05/07/2008
	<a href="#">Jeff Wilson</a>	jeff@memberclicks.com	05/07/2008
	<a href="#">Andy Ayers</a>	andy@memberclicks.com	05/08/2008
	<a href="#">Brandon Wycherly</a>	brandon@memberclicks.com	05/08/2008
	<a href="#">Roe Estand</a>	roe@memberclicks.com	05/08/2008
	<a href="#">Glenard Loy</a>	glenard@memberclicks.com	05/08/2008

Basic Contact	Name	Email Address	Created Date
	<a href="#">Thomas Howard</a>	thomas@memberclicks.com	05/07/2008
	<a href="#">Kazz</a>	kazz@memberclicks.com	05/07/2008

Professional	Name	Email Address	Created Date
	<a href="#">Mark Sedgley</a>	mark@memberclicks.com	05/07/2008
	<a href="#">Jim Grobe</a>	jim.grobe@wfu.edu	05/15/2008
	<a href="#">Tim Duncan</a>	tim@duncan.com	05/20/2008
	<a href="#">Bill Gates</a>	bill@mrssoftie.com	05/20/2008

Total Profiles: [12](#)

### **Why would I use this report?**

*This report creates a great opportunity to get a good handle on who is potentially new to the organization. Whether they were entered manually or went through your automated application process this report ensures your ability to appropriately welcome and communicate important information pertinent to the organization. This report eliminates the possibility that a new addition to your organization goes unnoticed.*

**Quick Tip:** *When profiles show up on this report in the Basic Contact group there is a good chance these are great prospecting opportunities!*

### **Member Group Summary by Renewal**

The last report contained in the Member Summary Section is the Member Group Summary by Renewal Date Range. In this report you will be able to view all members that have renewed their membership through your MemberClicks Dues Renewal type forms. To generate this report follow the first two steps as in the previous reports. You will notice on this report, however, that you have to choose which form you would like to generate the report from. The only forms that will show up on this list are forms that have an expiration date setting attached to them.

**Enter report details**

**Report Title:**

**Select Dates:**  ▼

**from:**  **to:**   
(MM/DD/YYYY) (MM/DD/YYYY)

- Select Forms:**
- All Forms
  - 2008 Membership Application
  - Dues Payment and Renewal



So in the details above essentially what we are asking for are all of the renewals that took place in the month May. This will execute all results that went through your dues renewal form. The next page is also a variation from the reports we have previously created. The next page asks that you specify the attribute you are keying off of.

**Enter report details**

**Select email address attribute:** ☹️  ▼



If you have several e-mail address attributes you would be able to select the appropriate e-mail field. Once we select the e-mail field, simply click continue and we will be able to review the details summary page. Once you are comfortable with the information click submit and you will receive a page that looks similar to the below example.

## Monthly Renewals

### Dues Payment and Renewal

Form Summary      Profiles: [3](#)  
                                 Receipts: [3](#)

Associate Member	Name	Email Address	Renewal Date	Receipt
	<a href="#">Dr. Ben Curry</a>	junk@memberclicks.com	05/20/2008	<a href="#">1129054</a>
	<a href="#">John Coates</a>	junk@memberclicks.com	05/20/2008	<a href="#">1129082</a>
<b>Totals</b>	Profiles: <a href="#">2</a>			Receipts: <a href="#">2</a>

Professional	Name	Email Address	Renewal Date	Receipt
	<a href="#">Mark Sedgley</a>	mark@memberclicks.com	05/08/2008	<a href="#">1104870</a>
<b>Totals</b>	Profiles: <a href="#">1</a>			Receipts: <a href="#">1</a>

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Summary      Total Profiles: [3](#)

You can see it breaks down all renewals by group that have occurred in May. You will also notice you now have a link to the actual individuals' receipts as well.

### ***Why would I use this report?***

*This report allows administrators or Membership Coordinators the flexibility to communicate in mass or on an individual basis in appreciation and or capitalize on upgrade opportunities.*

***Quick Tip:*** *In general it is a best practice approach to utilize the Dues Renewal Type Form to process your renewals.*

This completes the reporting features housed in the Member Summary reporting area. In review, you have the capability to pull, expirations, renewals, and additions that occur in the database through these reports.

### **Form Field Reporting:**

The next section we will focus on the Form Field Reports. There are two types of reports housed in this area.

**Field Limits**

- View form field limits
- Executed for one or more forms

**Selection Summary**

- View correlating selection information and correspondent revenue where applicable
- Executed for one or more forms

**Form Field Limits:**

This criteria allows you to conduct reports that will display summary analysis on a forms' field limits. Generally speaking field limits are incorporated into event registration forms to help manage breakout sessions, training, and or events within the event. This report will give you a quick snapshot of where your organization stands in relation to your limits. Please find an example breakout below.

**Enter report details**

**Report Title:** Breakout Status

- Select Forms:**  All Forms  
 Untangled 08



In this report the only form you have the capability to report upon is the Untangled Conference. This is due to the fact that the Untangled Conference is the only form with limits assigned to any fields. We will go through the same process from here that we have for all of the other reports. Below is an example of this executed report.

[← Report Details](#)

Save this report | Export as PDF | Export as XLS

**Breakout Status**

Untangled 08	Field	Selection	Limit	Selected	Available
	Events Attendance	Charity Golf Tournament -	100	<u>4</u>	96
		Closing Celebration -	100	<u>4</u>	96
		Opening Gala -	100	<u>4</u>	96
		Special Session -	50	<u>3</u>	47

Now you can quickly see the limited fields, what the limits are, and where you stand in regards to those limits. Moreover, if you click the hyperlinks associated to the above breakouts it will navigate you to the appropriate registrants' receipts.

***Why would I use this report?***

*This is a great report to effectively manage all types of breakout sessions. You will now have the ability on a daily or monthly basis to see where you are generating the most volume. This will create a more dynamic environment for managing room assignments, required resources, closures and openings, overflow management, ECT.*

**Field by Summary Report**

The next Criteria that are available within the Form Field Reporting is the Field by Summary Report. This report is great for generating a line by line revenue activity breakout analysis. In other words, all fields that are multi-select or revenue generating will be broken down in this report for you. This can occur across a single form or multiple forms. This report is conducted the same way as all others. The result is listed below.

## Revenue Breakout by Field

Untangled 08

Associate Member Fee	Selection	Number Selected	Amount
		<a href="#">2</a>	\$1,700.00
<b>Totals:</b>		<b>2</b>	<b>\$1,700.00</b>

Dietary	Selection	Number Selected	Amount
	Kosher	<a href="#">1</a>	\$0.00
	Shellfish Allergies	<a href="#">2</a>	\$0.00
	Vegetarian	<a href="#">2</a>	\$0.00
<b>Totals:</b>		<b>5</b>	<b>\$0.00</b>

Events Attendance	Selection	Number Selected	Amount
	Charity Golf Tournament -	<a href="#">4</a>	\$600.00
	Closing Celebration -	<a href="#">4</a>	\$300.00
	Opening Gala -	<a href="#">4</a>	\$300.00
	Special Session -	<a href="#">3</a>	\$150.00
<b>Totals:</b>		<b>15</b>	<b>\$1,350.00</b>

I will not be able to attend	Selection	Number Selected	Amount
		<a href="#">1</a>	\$100.00
<b>Totals:</b>		<b>1</b>	<b>\$100.00</b>

Non-Member Registration	Selection	Number Selected	Amount
		<a href="#">1</a>	\$1,000.00
<b>Totals:</b>		<b>1</b>	<b>\$1,000.00</b>

Professional Member Fee	Selection	Number Selected	Amount
		<a href="#">2</a>	\$1,500.00
<b>Totals:</b>		<b>2</b>	<b>\$1,500.00</b>

As you can see you now have the capability to go on a line by line basis to see what areas of your event or any form for that matter are generating the most revenue. The hyperlinks above will navigate you to the corresponding receipts.

### **Why would I use this report?**

*There are a number of applications for this report. The event component alone could point to several areas of utilization. This report takes a lot of the guess work out of managing an event. Whether it be*

*having accurate totals for a Golf Tournament to what your margin is on the food for an event this report will give you great information to manage more of the accounting aspects that an event entails.*

### **Form User and Activity Reports**

The next two reports are geared toward both form activity and non-activity. The first one is the form user report. In the form user report you can bring back results for all profiles that have activity in a particular form or multiple forms. Non-activity can also be sourced through this report. In order to create the report you follow the same methods we have used previously. On the creation page, however, there is a variation. Please see the example below.

#### **Enter report details**

**Report Title:**

**Select Dates:**  

**from:**  **to:**   
(MM/DD/YYYY) (MM/DD/YYYY)

- Select Forms:**
- All Forms
  - 2008 Membership Application
  - CD Order Form
  - Contact Us
  - Dues Payment and Renewal
  - Untangled 08
    - Use submissions
    - Use non-submissions
    - Use both submissions and non-submissions
  
    - Show other form submissions
    - Show other form non-submissions
    - Show no other form information



For each form you choose to report on you have to select what user activity you would like to review. So in the example above we have chosen to review user activity for the conference registration form. The current selection is for everyone that has “submitted” the form. However in the following selection we could choose to see all profiles that have not “submitted” the form. Then there is a third option for us to review all profiles that have and have not submitted the form.

Once we decide on the data set that we would like to review we then have the opportunity to review correlating information that we would like to see in conjunction with the submissions vs. non-submissions.

1. You can see all of the other forms that your profiles have submitted
2. You can see all of the other forms that your profiles have not submitted
3. Or you can decide on no additional information

Let's take a look at the results.

## Monthly Activity

Untangled 08

Total Form Submissions: 5      [Profiles](#) / [Receipts](#)  
 Total Eligible Users: 58      [Profiles](#)

Associate Member	Contact Name	Email Address	Submit Date	Other Form Submissions
	<a href="#">Alan Laster</a>	junk@memberclicks.com	<a href="#">5/8/08 3:23 PM</a>	
	<a href="#">Heather Fraser</a>	junk@memberclicks.com	<a href="#">5/8/08 3:16 PM</a>	
<b>Totals</b>	Profiles: <a href="#">2</a> / <a href="#">44</a>			Receipts: <a href="#">2</a> / <a href="#">5</a>

Basic Contact	Contact Name	Email Address	Submit Date	Other Form Submissions
	<a href="#">Kazz</a>	kazz@memberclicks.com	<a href="#">5/7/08 2:15 PM</a>	CD Order Form
<b>Totals</b>	Profiles: <a href="#">1</a> / <a href="#">2</a>			Receipts: <a href="#">1</a> / <a href="#">5</a>

Professional	Contact Name	Email Address	Submit Date	Other Form Submissions
	<a href="#">Jim Grobe</a>	jim.grobe@wfu.edu	<a href="#">5/19/08 2:59 PM</a>	
	<a href="#">Mark Sedgley</a>	mark@memberclicks.com	<a href="#">5/7/08 1:51 PM</a>	Dues Payment and Renewal
<b>Totals</b>	Profiles: <a href="#">2</a> / <a href="#">4</a>			Receipts: <a href="#">2</a> / <a href="#">5</a>

The information above is sorted by group and is displaying everyone that has submitted our conference registration form. We have their contact name, e-mail, submit date, and in the last column we are able to review all of their other form submission.

### **Why would I use this report?**

*This report is great for pulling profiles that are both active in a certain form but not active in another form. For example you now could easily pull all renewed members that have yet to register for the upcoming conference and vice versa.*

## Form Activity Report

The Activity Report is a very basic report that allows you to execute a report that brings back daily, weekly, monthly, or yearly activity by a single form and or multiple forms. To execute this report simply take the same steps we have in the previous reporting modes.

### **Why would I use this report?**

*This report would mainly be used to get a sense of activity. If you are currently in the midst of your dues renewal push, or coming up on a date-based price expiration (early bird pricing) for your conference, you will be able to see the volume pushing through your MemberClicks forms.*

### **Form Revenue Reports:**

The form revenue report contains the most extensive options for reporting on revenue of all the reporting components. In this are you will be able to view total revenue charged across all forms. You will be able to retrieve all profiles that have an owed balance. Built into this section is the ability to breakdown all revenue by transaction type. Lastly you will be able generate a report that displays revenue by group. Each of these reports are more summary based. Allowing you as an administrator to get a better view from the top of all the revenue activity that is flowing through your MemberClicks forms.

Form Revenue Report	
<b>Choose criteria</b> Select the criteria for the report you want to create.	
<b>Component revenue by form</b> <ul style="list-style-type: none"><li>• Total revenue for all forms by form</li><li>• Executed across one or more selected forms</li></ul>	<b>Total revenue by member group</b> <ul style="list-style-type: none"><li>• Total revenue by member group or attribute across specified form(s)</li><li>• Executed across one or more selected forms</li></ul>
<b>Revenue distribution by pricing</b> <ul style="list-style-type: none"><li>• View revenue distribution by field</li><li>• Executed across one or more selected forms</li></ul>	<b>Payment / credit activity summary</b> <ul style="list-style-type: none"><li>• View payments and credits activity summary by form</li><li>• Executed across one or more selected forms</li></ul>
<b>Revenue by form payment option</b> <ul style="list-style-type: none"><li>• View transaction amounts by form payment option and as a component of total revenue for a form</li><li>• Executed across one or more selected forms</li></ul>	<b>Receipts with balance due</b> <ul style="list-style-type: none"><li>• View total balance due amount as a component of total revenue</li><li>• Executed across one or more selected forms</li></ul>
<b>Discount code summary</b> <ul style="list-style-type: none"><li>• View discount code summary use and as a component of total revenue</li><li>• Executed across one or more selected forms</li></ul>	<b>Date-based pricing summary</b> <ul style="list-style-type: none"><li>• View date-based pricing summary use and as a component of total revenue</li><li>• Executed across one or more selected forms</li></ul>

## Component Revenue by Form

In this report you will be able to generate a breakdown of revenue comparisons over a date range. This report is very useful in reviewing revenue generation across multiple forms and multiple years. In the example below we have chosen to review revenue generated across all of our forms YTD.

### Enter report details

**Report Title:** Revenue By form

**Select Dates:** this year

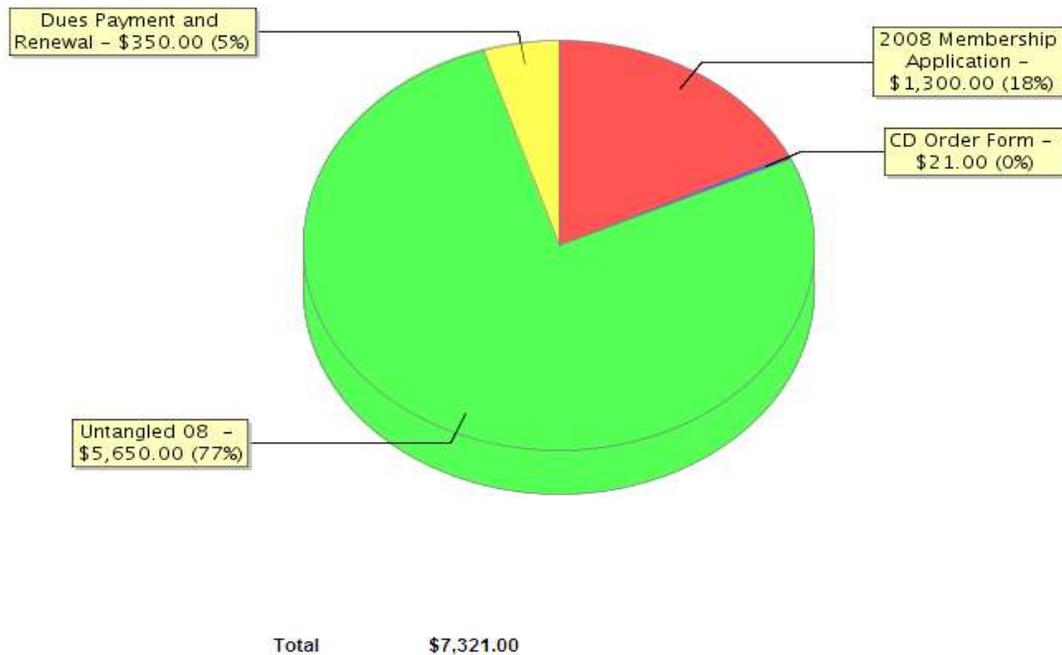
**from:** 01/01/2008 **to:** 12/31/2008  
(MM/DD/YYYY) (MM/DD/YYYY)

- Select Forms:**
- All Forms
  - 2008 Membership Application
  - CD Order Form
  - Contact Us
  - Dues Payment and Renewal
  - Untangled 08



The result looks like this.

### Revenue By form



The report displays the information in a chart format detailing volume by form and the cumulative total at the bottom.

#### ***Why would I use this report?***

*This is a great report to see exactly which parts of your organization are generating and which aren't. It also creates a great way to do year over year comparisons in all areas of the organization. This could range from conference to conference comparisons to year over year renewal analysis.*

**Quick Tip:** *When you are ready to do year over year analysis by form simply go in and re-activate the older comparison form in form settings and run your component revenue report!*

### **Revenue by Payment Option**

The goal of this report is very simple; breakdown transactions per form by payment option selected. If you allow your end users to click different options on the payment pages of your forms, this report will display the different payment options currently being utilized. We are going to generate a report across all forms YTD to demonstrate this.

**Enter report details**

**Report Title:**

**Select Dates:**  

**from:**  **to:**   
(MM/DD/YYYY) (MM/DD/YYYY)

- Select Forms:**
- All Forms
  - 2008 Membership Application
  - CD Order Form
  - Contact Us
  - Dues Payment and Renewal
  - Untangled 08



Below our transactions are broken out by type and by form:

**Payment Detail**

2008 Membership Application	Payment Type	Revenue	Percent of Total
	Off-line Credit Card	\$0.00	0%
	Send Check	\$1,300.00	100%
<b>Total for 2008 Membership Application</b>		<b>\$1,300.00</b>	<b>100%</b>
CD Order Form	Payment Type	Revenue	Percent of Total
	Off-line Credit Card	\$0.00	0%
	Send Check	\$21.00	100%
<b>Total for CD Order Form</b>		<b>\$21.00</b>	<b>100%</b>
Dues Payment and Renewal	Payment Type	Revenue	Percent of Total
	Off-line Credit Card	\$0.00	0%
	Send Check	\$350.00	100%
<b>Total for Dues Payment and Renewal</b>		<b>\$350.00</b>	<b>100%</b>
Untangled 08	Payment Type	Revenue	Percent of Total
	Off-line Credit Card	\$0.00	0%
	Send Check	\$5,650.00	100%
<b>Total for Untangled 08</b>		<b>\$5,650.00</b>	<b>100%</b>

In the above example, we only have two payment options available on each form and all of the current transactions have been the send check option.

**Why would I use this report?**

*In this report you be able to be very specific in terms of how your organization is collecting money. This can lead you to be more strategic in how you market different payment options. If you are heavy in one type of payment you can be effective in changing behavior.*

**Discount Code Summary:**

This is a great report for breaking down which discount codes are being used and their percentage of the total revenue for the time period pulled. Conducting this report is much the same as all of the other reports. Please see a sample listing below.



Report Details | Save this report | Export as PDF | Export as XLS

Untangled 08	Discount Code	Description	Revenue	Percent of Total Revenue
	Speaker97		\$600.00	10%
<b>Total for Untangled 08</b>			<b>\$600.00</b>	<b>10%</b>

**Why would I use this report?**

*This report is great for getting a good sense of VIP, Board, Speaker, or Vendor registrations. Basically anyone that you have provided a discount code for registration, membership, and even renewals.*

**Revenue by Group:**

In this report you will be able to view how each one of your groups within the MemberClicks database is performing from a revenue perspective. To conduct this report you will simply select the form/s that you want to breakdown as seen below.

## Enter report details

**Report Title:** Revenue by Group New Applications and Renewals

**Select Dates:** this year

**from:** 01/01/2008 **to:** 12/31/2008  
(MM/DD/YYYY) (MM/DD/YYYY)

- Select Forms:**
- All Forms
  - 2008 Membership Application
  - CD Order Form
  - Contact Us
  - Dues Payment and Renewal
  - Untangled 08



In the example above we are going to generate a comparison of the Professional and Associate Groups across new member applications and renewals for 08.

[Report Details](#)

Save this report | Export as PDF | Export as XLS

### Revenue by Group New Applications and Renewals

2008 Membership Application	Group	Submissions	Revenue
	Associate Member	<u>8</u>	\$1,150.00
	Professional Member	<u>1</u>	\$150.00
<b>Total for 2008 Membership</b>		<b>9</b>	<b>\$1,300.00</b>

Dues Payment and Renewal	Group	Submissions	Revenue
	Associate Member	<u>2</u>	\$200.00
	Professional Member	<u>1</u>	\$150.00
<b>Total for Dues Payment</b>		<b>3</b>	<b>\$350.00</b>

As we can see from the report we have generated much more traffic for new members with the Associate Member offering. So far this year we haven't seen very much renewal activity thus far. This may give your organization insight as to your current structure and/or membership offerings.



