ADVANCED WEBINAR

Building Custom Reports

Bonterra™

Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction

Bonterra™

Agenda

1. The Report Manager
2. Customized Reporting
   - The PDF Report Builder
   - Counts and Crosstabs
   - Export Formats
   - Fundraising Analysis
3. The Analytics Dashboard
   - Creating Customized Dashboards

The Report Manager

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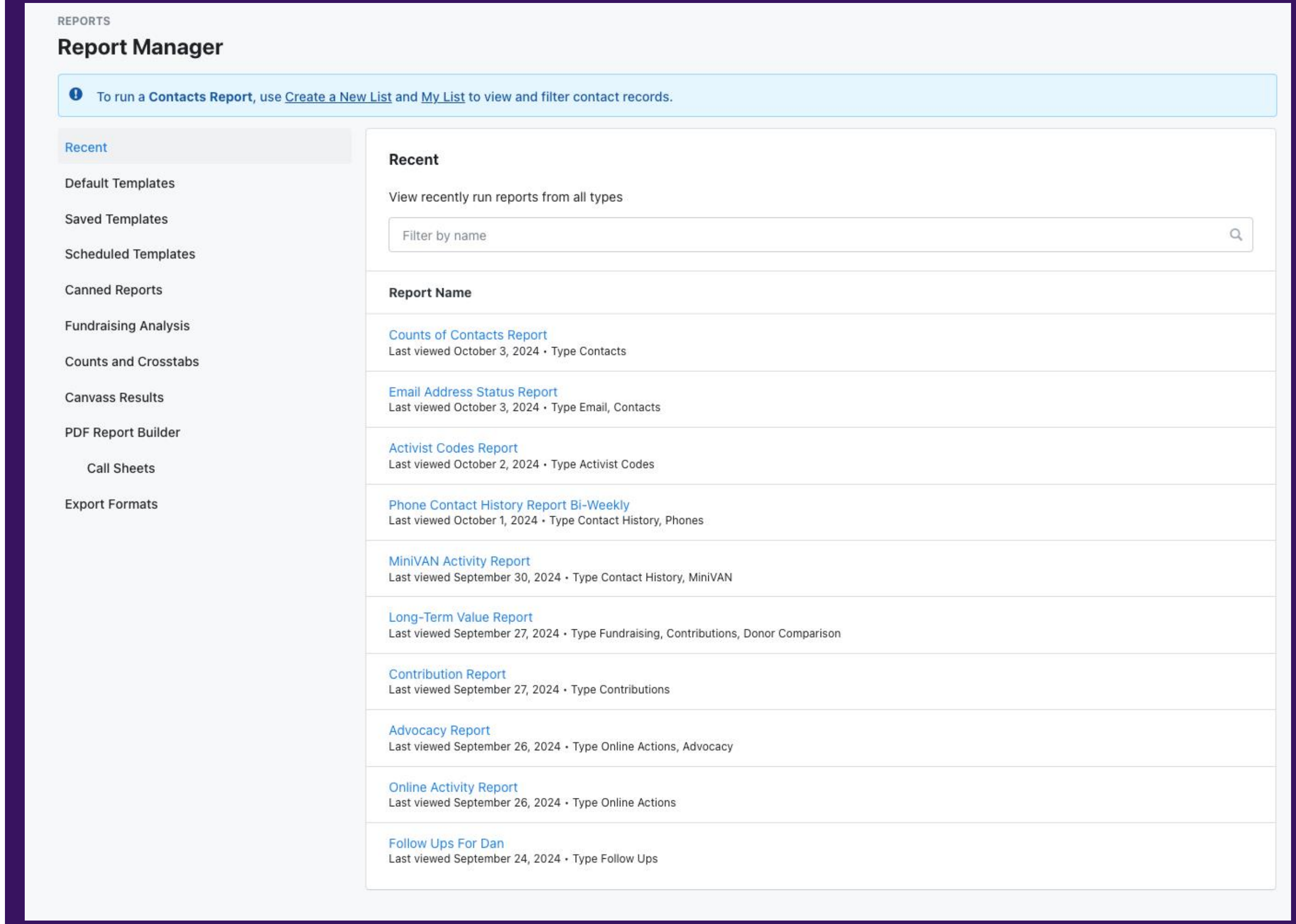
A Hub for Analysis

The **Report Manager** within EveryAction acts as a library for reports, whether those are system default reports or those that an admin has customized.

The manager itself will be broken down into separate sections based on what information is needed.

By default, the Manager will open to your most recently run reports for convenience.



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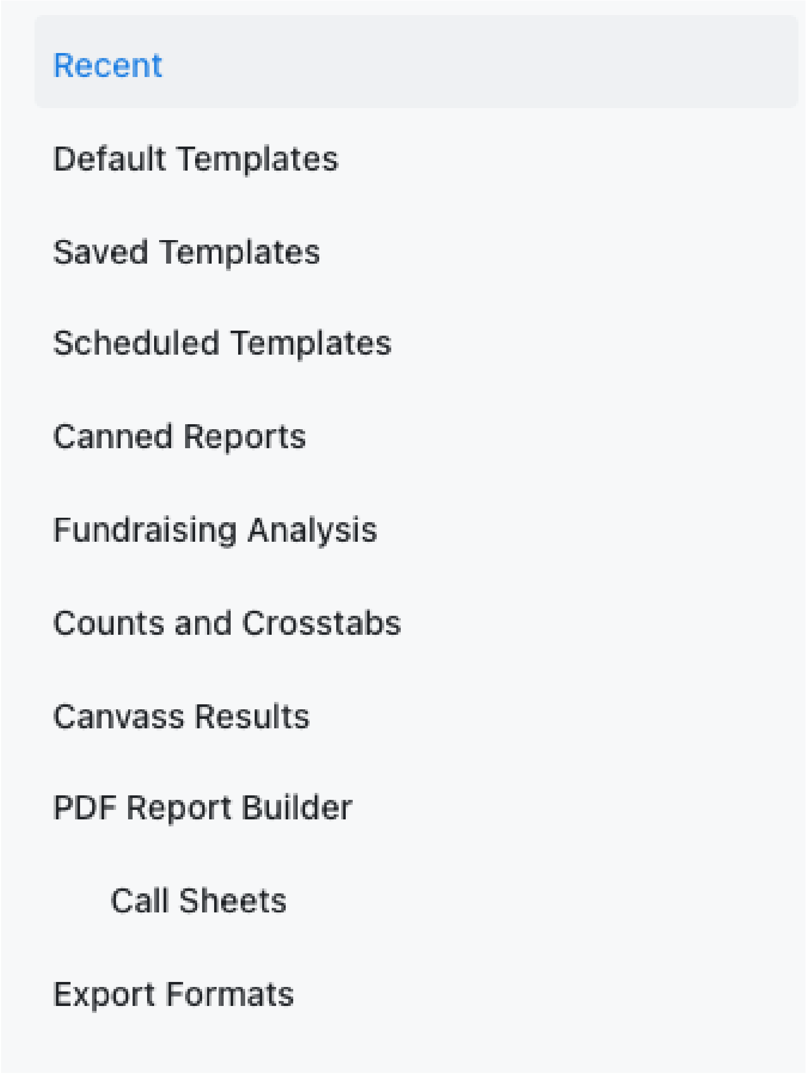
Reporting Subsections

The breakdown of these sections are as follows:

- **Default Templates:** contains all Built In Reports.
- **Saved Templates:** containing any saved versions of reports a user has altered within the database.
- **Scheduled Templates**: Like Saved Templates, any saved report can be scheduled to automatically be emailed at a set interval.
- **Canned Reports:** This contains only one report: the Ticketed Event Guest List report.
- **Canvass Results:** contains a breakdown of canvassing efforts broken down by canvassed County.

Counts and Crosstabs, the PDF Report Builder, Export Formats and Fundraising Analysis, however, are complex enough that they will warrant their own discussion each in the Customized Reporting section of this training.



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Customized Reporting

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The PDF Report Builder

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A Quick Reference Guide

There may be the need to, at times, generate lists that provide an in-depth overview of a contact to be provided to a non-user, solicitor, relationship manager or volunteer assisting with efforts at your nonprofit.

While it typically recommended that the tool designed specifically for that effort be used (**MiniVAN** or **Virtual Phone Bank** for canvassing for example, or **Call Time** for fundraising), we do provide a way to easily create printable sheets you can share with others.

This can be achieved through the **PDF Report Builder,** and due to the necessary bank of knowledge required to use this tool, this should typically be reserved to Admin or Managers only.

Name
Mark Sullivan
Street Address

54 Viceroy Way	Cambridge, MA 00000	(333) 333-3334

Relations, listed:

Smith, Andrea	Partner
Doe, Susan	Friend
Miller, Arthur	Associate
Eliot, George	Manager
Local Chapter Org.	Chapter

Financial Household Members

Doe, Jane	(111) 111-1111
Doe, John	(222) 222-2222
Doe, Amy	(333) 333-3333
Doe, Betty	(444) 444-4444
Doe, Charles	(555) 555-5555

Date and Amount of First Gift		Date and Amount of Most Recent Gift	
5/19/2008	$250.00	3/1/2017	$800.00

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Configuring New PDF Reports

Our base setup process for PDF reports is:

- Access **PDF Report Builder** from within the Report Manager
- Choose to **Create New PDF Report**

Then, a type will need to be selected, based on how this sheet will be used (for calls, basic profiles, or *other*), as well as designating a name and description.

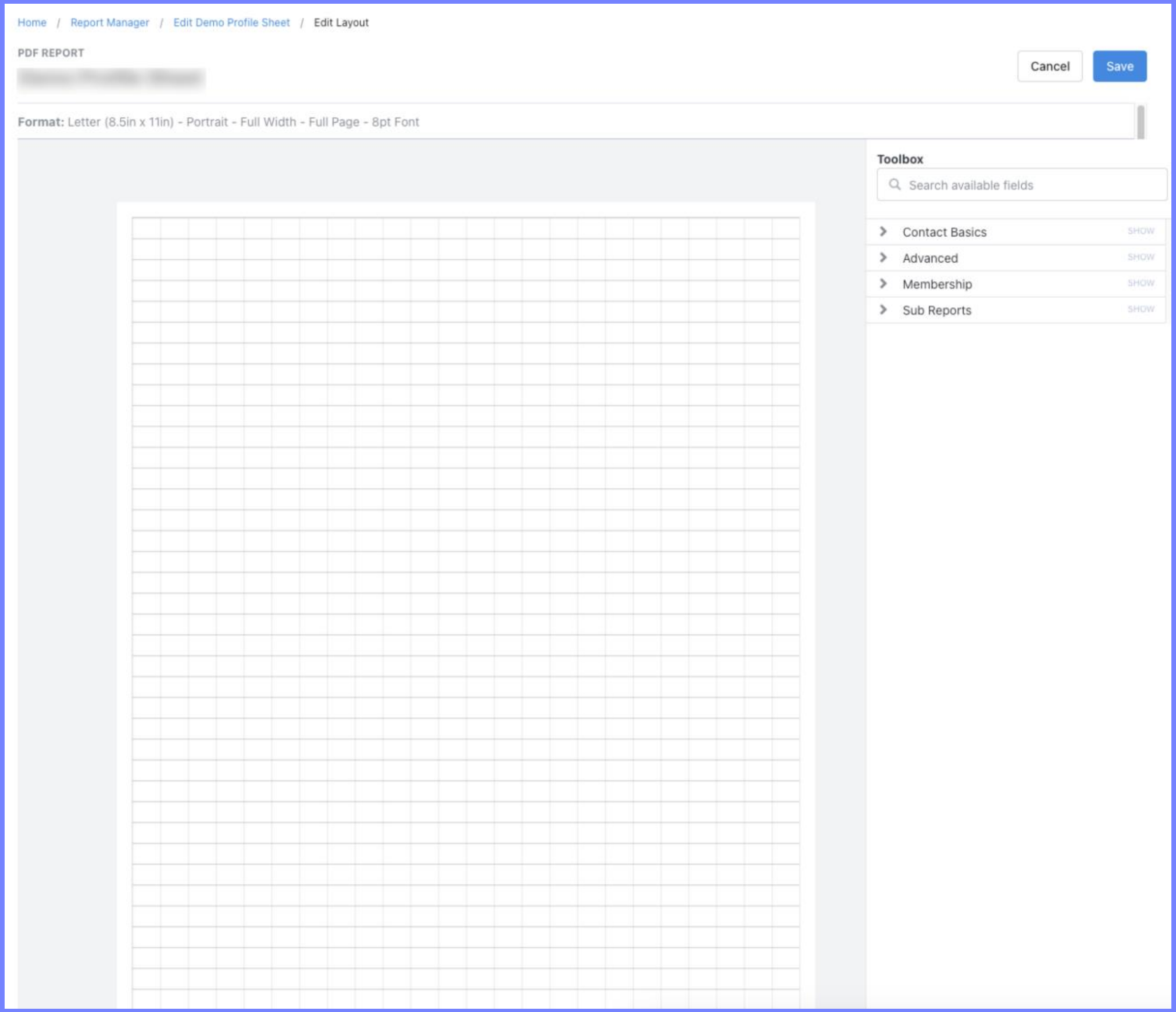
Lastly, as this is intended for print/screen reading, your default font size and page height will need to be defined.

Drag and Drop Editor

To help visually illustrate the expected outcome of your report, the PDF Builder features a drag and drop editor to place contact fields into our report.

As these reports are meant to be data aggregates, it is expected that our fields within this builder are limited, and fall into 4 major categories:

- Contact Basics (demographics)
- Advanced (typically internally created data, Custom Fields, Activist Codes, etc.)
- Membership Details
- Sub Reports (where most financial focused data resides)



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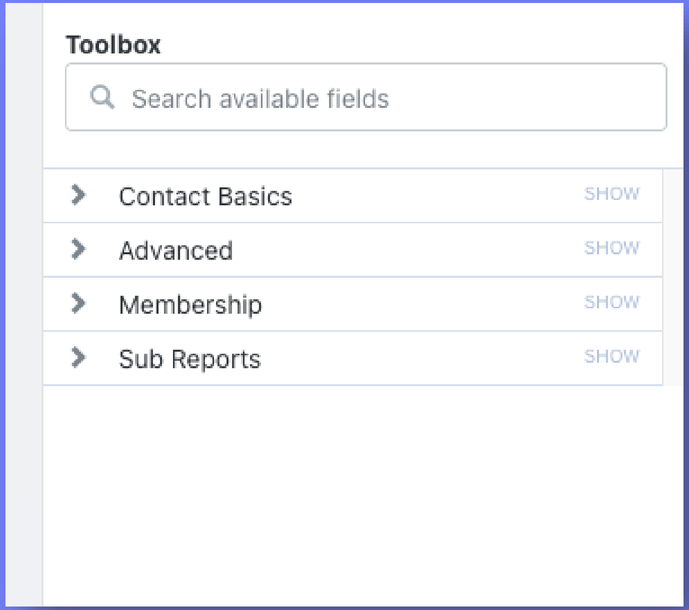
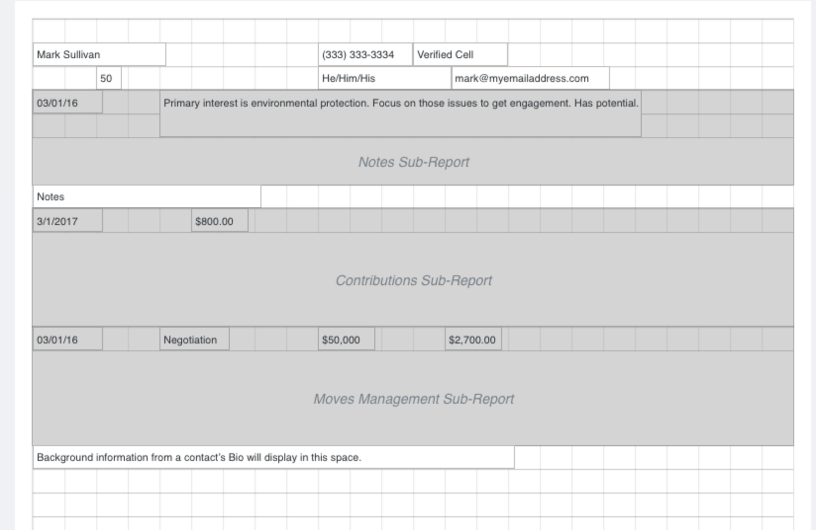
Features of the Editor

Like other report functions in EveryAction, the Toolbox has many tricks contained therein. Helpful “good to knows” are:

- Reports can be built with **Checkbox** and **Custom Text** fields, allowing users to add context or fillable items to this report that are not being output.
  - Fields are **not labeled** when placed into your reports or on generation. If a description to a field or sub-report is needed, this must be created via the **Advanced > Custom Text/Label** field.
- Fields are searchable, meaning each section does not need to remain open during your build. Simply search phrases like “Name”, “Preferred Email/Phone”, and “Home Street Address”.
- Contribution “landmarks” are available under the Contact Basics section, meaning things like Number of Total Contributions, Date of First and Most Recent, as well as Amount can be configured to the report.
- Again, as this intersects with other reports, there are tables that can be pulled into this report featuring information on Contributions Lists or Totals, Financial Households, Relationships, and more.
- All fields will have tooltips, giving information on hover-over to show the expected output and format.





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Using Your Report

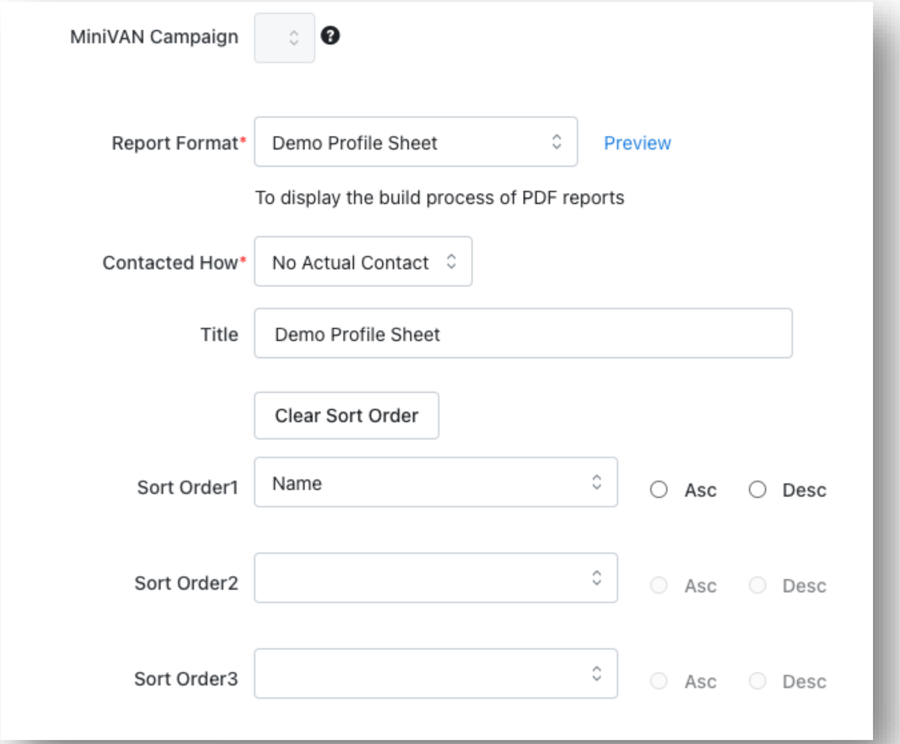
Once saved, these PDF reports can be used directly through the Report Manager. As generating these files will require contacts to be loaded to **My List,** use of the Create A List tool will be required first.

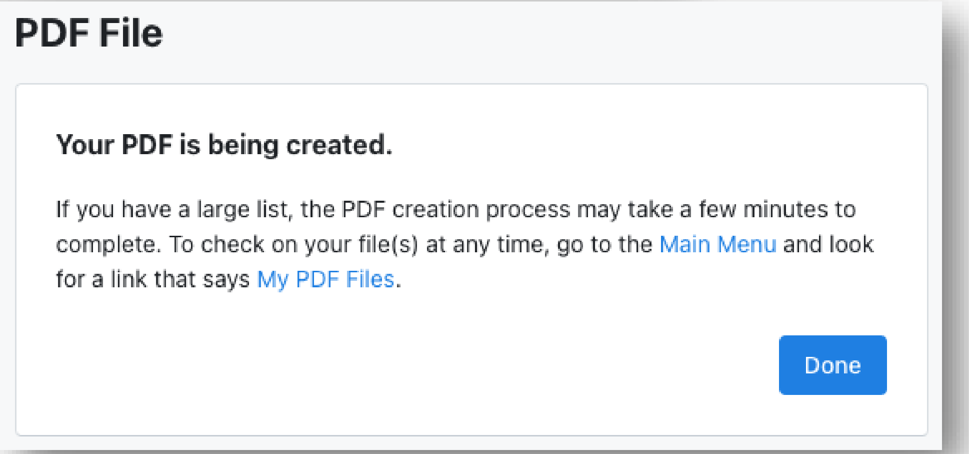
Once your List is loaded, choose to **Print My List.**

Options for your Report Format, Contacted How, and Sort Order can be selected through this step.

An important note is that **Contacted How** can be set to *No Actual Contact* if this list is being generated for any reason other than reaching this person.

To complete the process, click “Next” at the bottom right of the screen. This will take you to a notice stating that the report is being generated in the background, and that you will be notified when the process is complete.





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Counts And Crosstabs

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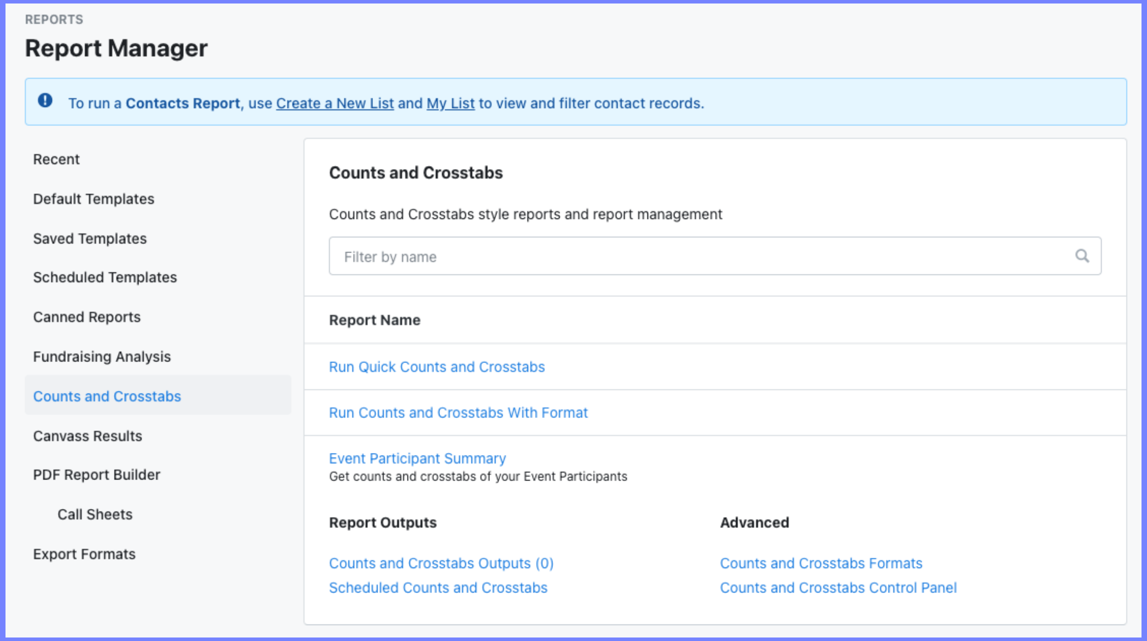
Where Your Data Intersects

The **Counts and Crosstabs** tool is mainly to do a quick comparison and totaling of specific opt-in or demographic fields on a Contact's record.

For example, using this tool, a report can be created to show the totals for how your Activist Code assignment is distributed by age ranges.

Like the PDF Report Builder, this data can also be focused on a specific list as well.

This tool can be accessed directly from the **Report Manager** or independently from the **Search for a Page** menu.



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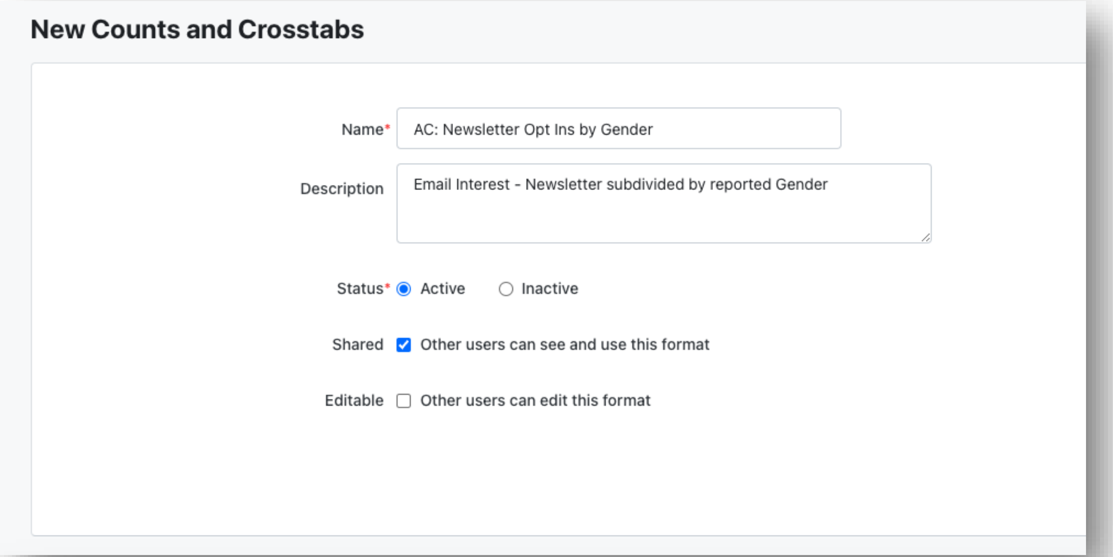
Custom Formatting Counts and Crosstabs

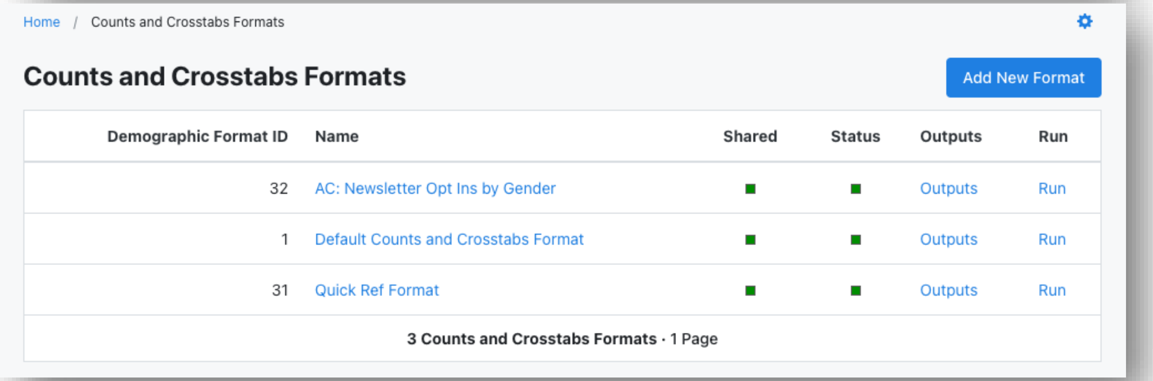
If there is a need to run a snapshot of certain fields in Counts and Crosstabs consistently, user generated formats can be created to save time.

By searching **Counts and Crosstabs Formats**, a template can be saved for quick access.

These custom formats can be shown to break down by People, Doors, Mailboxes, or Phones, depending on its use case. Additionally, Overlaps and Totals for each section can be shown.

Each Row and Section will need to be saved as these reports are built and saved fully once complete.





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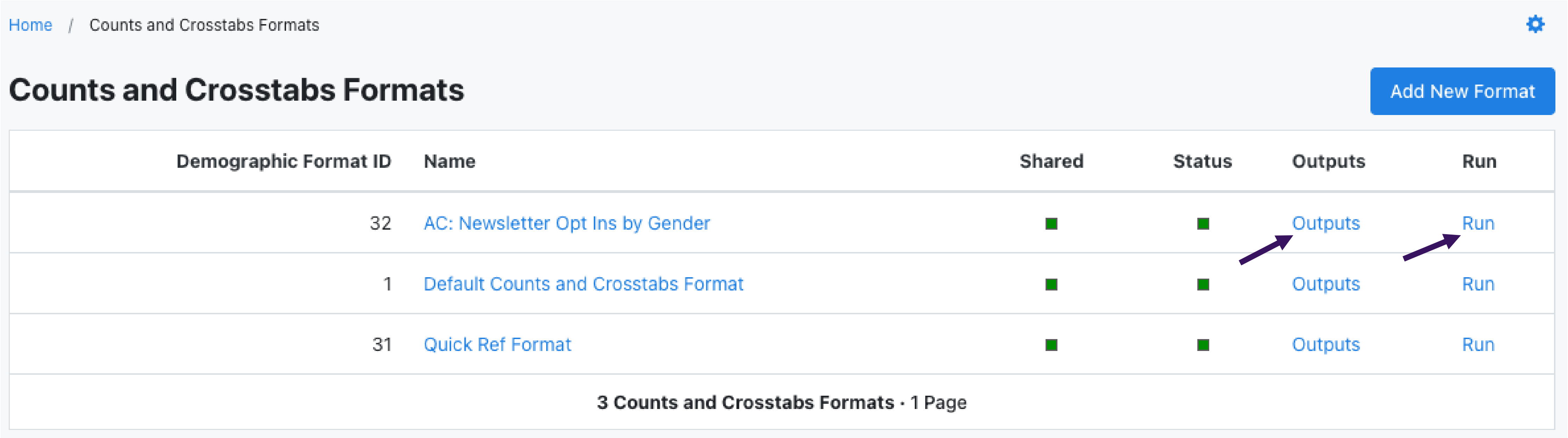
Running and Reviewing Saved Formats

From within the Counts and Crosstabs Formats menu, the options to review prior **Outputs** and to **Run** these saved formats are present.

- When selecting **Outputs**, a menu will be displayed providing the results of each prior time a format has been run.
- When selecting **Run**, options to generate this format for *My List, All Contacts, or a Saved List/Search* are provided, as well as allowing the user to re-title the report for this session.


Home / Counts and Crosstabs Formats

Counts and Crosstabs Formats

Add New Format

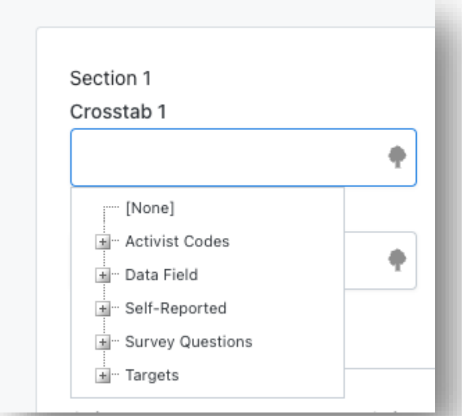
Demographic Format ID	Name	Shared	Status	Outputs	Run
32	AC: Newsletter Opt Ins by Gender	■	■	Outputs	Run
1	Default Counts and Crosstabs Format	■	■	Outputs	Run
31	Quick Ref Format	■	■	Outputs	Run

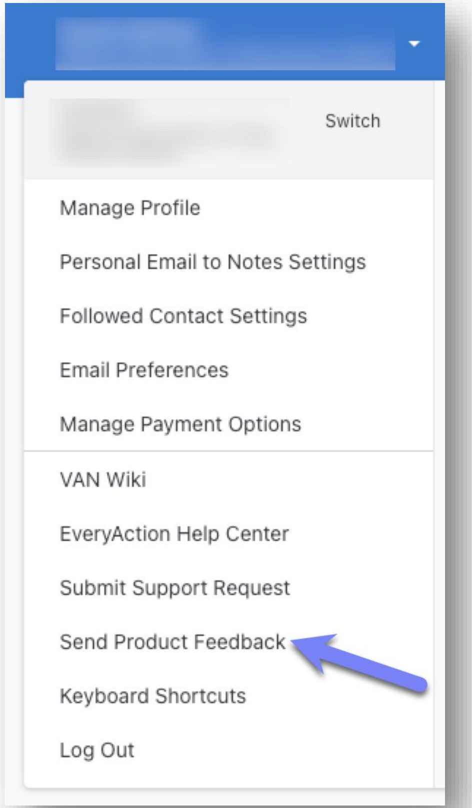
3 Counts and Crosstabs Formats · 1 Page

Current Data Limitations in Counts and Crosstabs

As previously mentioned, this tool is limited to **only return information from limited fields on a contact record.** It is *highly recommended* to review all the available fields within Counts and Crosstabs to determine how effective your use of this tool might be.

If this does seem like a tool that can provide a major value prospect for other types of data, note that there can also be suggestions submitted to alter this report in future software iterations via the **Send Product Feedback** link under your settings menu at the top right of your EveryAction dashboard.



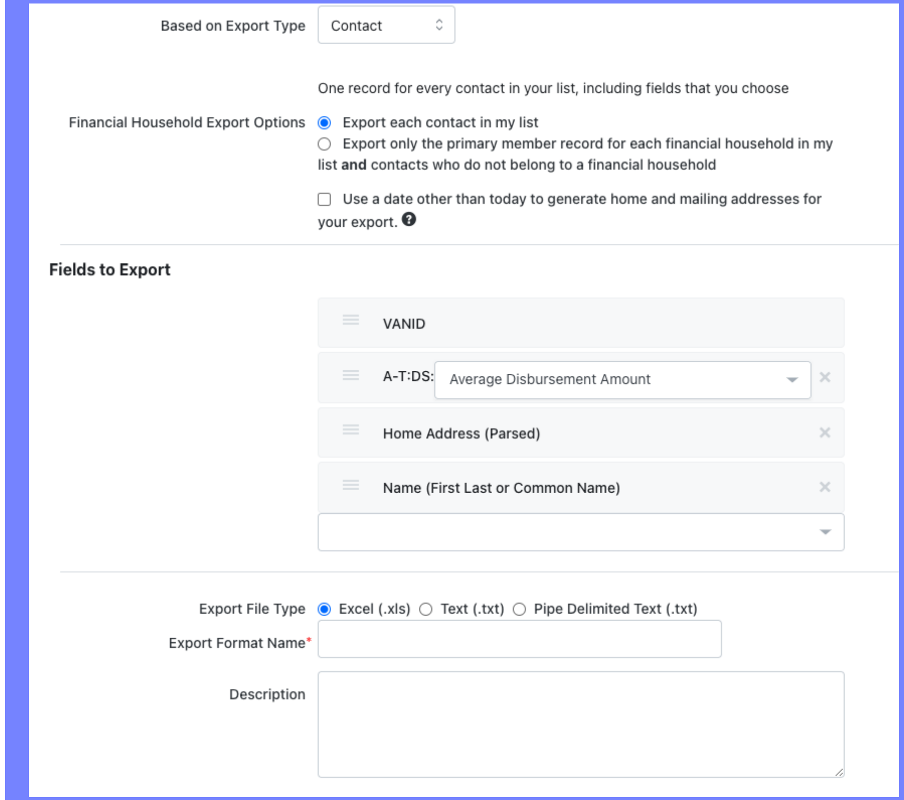


Export Formats

Saving Yourself Time and Effort

Export Formats are meant to be used as a way of streamlining your data-offload processes. While exports are done from Create A List, the process of customizing these can be tedious, depending on your preferred arrangement and choice of output fields.

To create your customized exports, use the **Search for A Page** menu to pull up “Export Formats”, and choose to Add New Format at the top right of the screen.



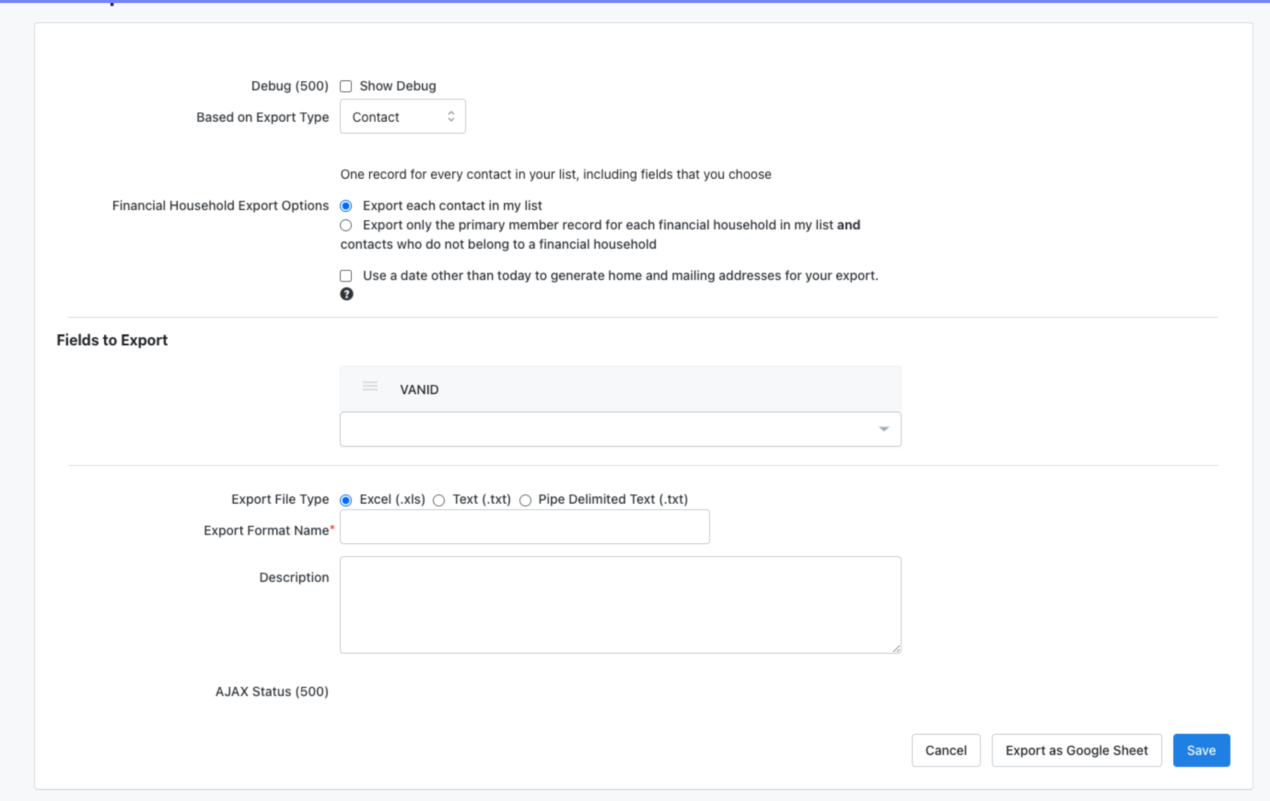
Configuring An Export

Export Formats can be output in 4 categories, based on their use case:

- Contact
- Direct Mail
- Telemarketing
- Digital Ads

Your export can be set to only generate all records as individuals or as households and individuals.

Additionally, if the intended use of this output data is to reach out to your contact base, the option to set a date range for this file. This is to ensure Seasonal Addresses are contacted properly.



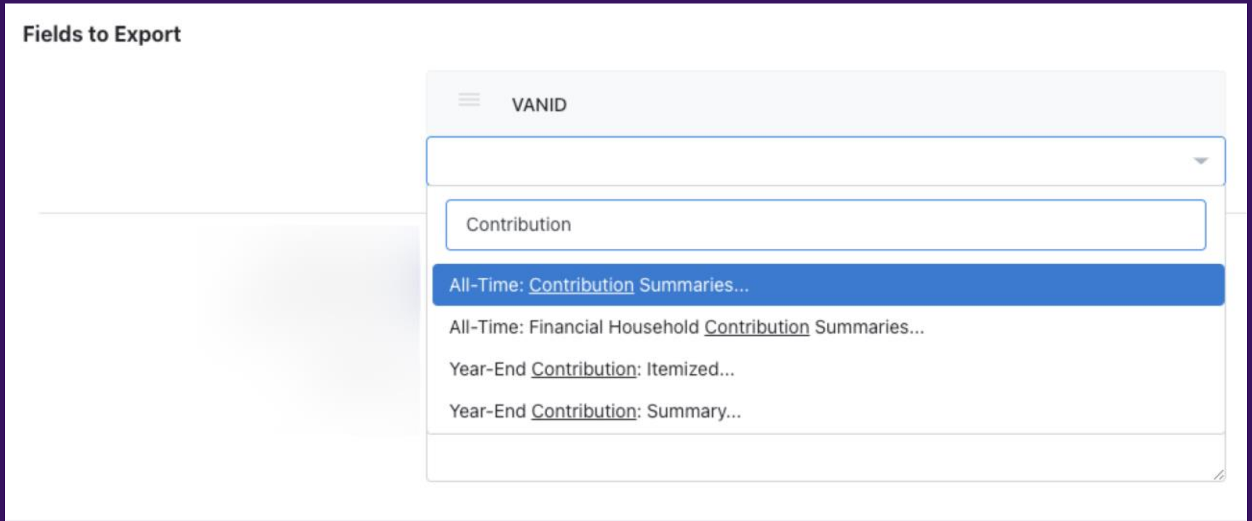
Output Fields in Export Format

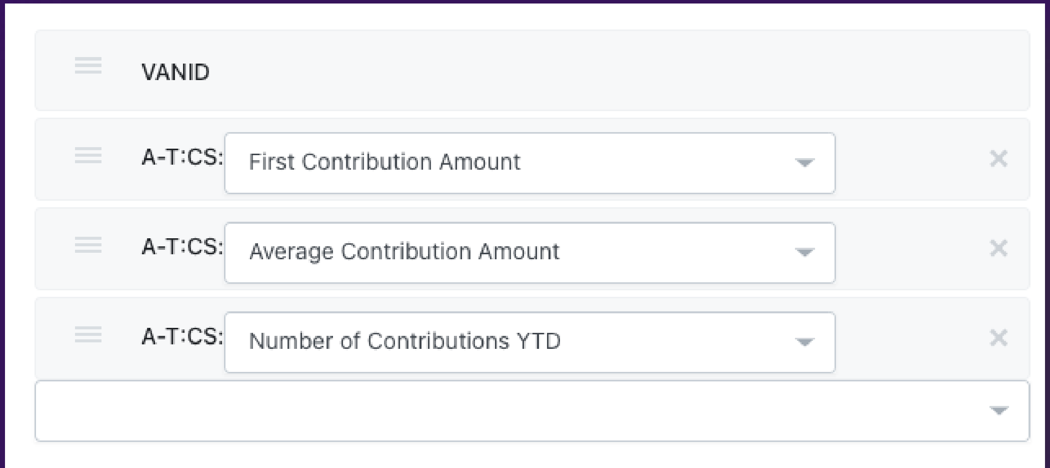
The same logic seen in the PDF Report Builder exists with what data can be output in the Export Format tool.

There are limitations on what data is available, specifically in terms of being able to generate things like entire contribution lists.

It is possible to output totals, aggregates, and even Year End lists, however, certain fields will require repeated addition to the export format.

This displayed outputs are using repeated versions of the “All-Time Contribution Summary” field to create a fuller picture of a contact’s contribution *totals.*





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FAQs for Export Formats

- *Are Export Formats able to be edited once saved?*
  - Yes, these can be edited by accessing your Export Formats menu, as was done when creating your dataset. Select the format that needs to be changed, update your settings, and Save at the bottom right of the menu.
- *Are Export Formats able to be shared?*
  - Currently, no. For most clients, this is not possible, but if questions arise regarding the need for this, certain databases can be altered to allow Formats to be available to all users.

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Fundraising Analysis

Comparative Donor Reports

The main function of the Fundraising Analysis reports are to weigh your existing fundraising data either by comparing year-vs.-year, aggregating donors by Highest Previous Contributions, or by doing a year-over-year trending report.

As a point of convenience, the filtering and criteria within the setup steps of these reports are nearly identical, with the exception being your Year Over Year report having additional fields for time range.

Report Name	Type
Donor Comparison Report: Last Year vs Two Years Ago Donor Contribution Report View how many active, new, reactivated, and lapsed donors you had last year and compare their giving totals last year to their giving totals 2 years ago.	Fundraising Analysis
Donor Comparison Report: This Year vs Last Year Donor Contribution Report View how many active, new, reactivated, and lapsed donors you have this year and compare their giving totals this year to their giving totals last year.	Fundraising Analysis
Donor Range Report: Highest Previous Contribution View counts of your donors, grouped by the amount and date of their Highest Previous Contribution (HPC).	Fundraising Analysis
Year Over Year Contribution Report View trends in yearly contribution totals, broken down by whether the contributions came from new, active, or reactivated donors.	Fundraising Analysis

The Filter Set

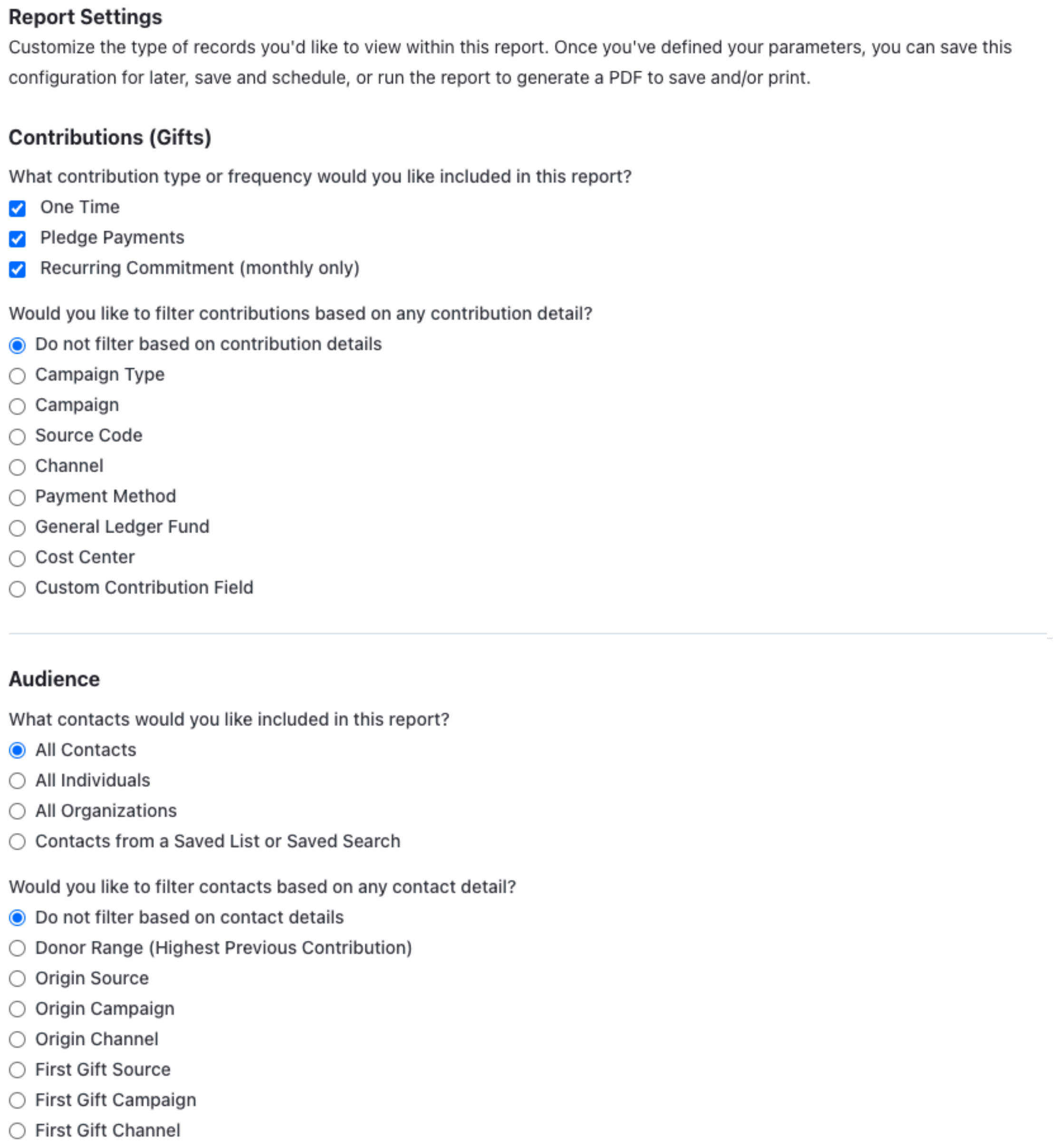
Each filter available for the Fundraising Analysis reports follow the same include/exclude logic present for built in reports, wherein multiple items can be included or excluded based on your reporting goal.

The report can be targeted to individuals, organizations, both, or a saved Search or List.

Lastly, filters for donor contact detail can be included to further refine your output list, including narrowing your scope based on contact origin source, donor range, or first gift source.

Once you have set your filters, ensure that you save your report using the “Save As” option.

Save As...


Report Settings

Customize the type of records you'd like to view within this report. Once you've defined your parameters, you can save this configuration for later, save and schedule, or run the report to generate a PDF to save and/or print.

Contributions (Gifts)

What contribution type or frequency would you like included in this report?

- [x] One Time
- [x] Pledge Payments
- [x] Recurring Commitment (monthly only)

Would you like to filter contributions based on any contribution detail?

- (●) Do not filter based on contribution details
- ( ) Campaign Type
- ( ) Campaign
- ( ) Source Code
- ( ) Channel
- ( ) Payment Method
- ( ) General Ledger Fund
- ( ) Cost Center
- ( ) Custom Contribution Field

Audience

What contacts would you like included in this report?

- (●) All Contacts
- ( ) All Individuals
- ( ) All Organizations
- ( ) Contacts from a Saved List or Saved Search

Would you like to filter contacts based on any contact detail?

- (●) Do not filter based on contact details
- ( ) Donor Range (Highest Previous Contribution)
- ( ) Origin Source
- ( ) Origin Campaign
- ( ) Origin Channel
- ( ) First Gift Source
- ( ) First Gift Campaign
- ( ) First Gift Channel

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The Report – Year Over Year

Year-Over-Year
Contribution Report
All Contacts; Last 5 Years; Calendar Year; Contribution Frequency: All

Donors

Year	New Donors (Amount)	Diff	New Donors (Contribs)	Diff	Active Donors (Amount)	Diff	Active Donors (Contribs)	Diff	Reactivated Donors (Amount)	Diff	Reactivated Donors (Contribs)	Diff
2024	$390,345.48	($593,514.52)	71	-24	$197,242.54	$98,000.54	193	184	$1,156,130.00	$717,772.00	830	795
2023	$983,860.00	($430,081.00)	95	-24	$99,242.00	$67,156.00	9	6	$438,358.00	$54,802.00	35	1
2022	$1,413,941.00	$24,476.00	119	5	$32,086.00	($10,614.00)	3	-1	$383,556.00	$179,625.00	34	18
2021	$1,389,465.00	($145,688.00)	114	-2	$42,700.00	$42,700.00	4	4	$203,931.00	($142,799.00)	16	-7
2020	$1,535,153.00	$0.00	116	0	$0.00	$0.00	0	0	$346,730.00	$0.00	23	0

Contributions & Recurring Commitments

Year	Contributions (Amount)	Diff	Contributions (Count)	Diff	Contributions (Average Amount)	Diff
2024	$1,743,718.02	$222,258.02	1,094	955	$1,593.89	($9,351.86)
2023	$1,521,460.00	($308,123.00)	139	-17	$10,945.76	($782.34)
2022	$1,829,583.00	$193,487.00	156	22	$11,728.10	($481.58)
2021	$1,636,096.00	($245,787.00)	134	-5	$12,209.67	($1,329.06)
2020	$1,881,883.00	$0.00	139	0	$13,538.73	$0.00

The Report – This Year vs. Last Year

This Year (TY) vs. Last Year (LY)
Donor Comparison Report
All Contacts; Contribution Frequency: All

Donor Status	Total Donors	LY Contributions	TY Contributions	Change in Contributions	% Change in Contributions	LY Amount	TY Amount	Change in Amount	% Change in Amount
Active LY, Upgraded TY	4	4	7	3	75%	$2,356.00	$6,768.00	$4,412.00	187.26%
Active LY, Level TY	0	0	0	0		$0.00	$0.00	$0.00	
Active LY, Downgraded TY	40	40	49	9	22.5%	$535,244.00	$56,295.00	($478,949.00)	-89.49%
First-Time LY, Upgraded TY	1	1	11	10	1000%	$172.00	$2,818.54	$2,646.54	1538.68%
First-Time LY, Level TY	0	0	0	0		$0.00	$0.00	$0.00	
First-Time LY, Downgraded TY	93	94	126	32	34.04%	$983,688.00	$131,361.00	($852,327.00)	-86.65%
First-Time TY	39	0	71	71		$0.00	$390,345.48	$390,345.48	
Reactivated TY	714	0	830	830		$0.00	$1,156,130.00	$1,156,130.00	
Active LY, Lapsed TY	0	0	0	0		$0.00	$0.00	$0.00	
First-Time LY, Lapsed TY	0	0	0	0		$0.00	$0.00	$0.00	

Donor Status	LY Average	TY Average	Change in Average	% Change in Average
Active LY, Upgraded TY	$589.00	$966.86	$377.86	64.15%
Active LY, Level TY	$0.00	$0.00	$0.00	
Active LY, Downgraded TY	$13,381.10	$1,148.88	($12,232.22)	-91.42%
First-Time LY, Upgraded TY	$172.00	$256.23	$84.23	48.97%
First-Time LY, Level TY	$0.00	$0.00	$0.00	
First-Time LY, Downgraded TY	$10,464.77	$1,042.55	($9,422.22)	-90.04%
First-Time TY	$0.00	$5,497.82	$0.00	
Reactivated TY	$0.00	$1,392.93	$0.00	
Active LY, Lapsed TY	$0.00	$0.00	$0.00	
First-Time LY, Lapsed TY	$0.00	$0.00	$0.00	

The Report – This Year vs. Two Years Ago

Last Year (LY) vs. Two Years Ago (2YA)

Donor Comparison Report

All Contacts; Contribution Frequency: All

Donor Status	Total Donors	2YA Contributions	LY Contributions	Change in Contributions	% Change in Contributions	2YA Amount	LY Amount	Change in Amount	% Change in Amount
Active 2YA, Upgraded LY	0	0	0	0		$0.00	$0.00	$0.00	
Active 2YA, Level LY	0	0	0	0		$0.00	$0.00	$0.00	
Active 2YA, Downgraded LY	1	1	1	0	%	$17,532.00	$7,242.00	($10,290.00)	-58.7%
First-Time 2YA, Upgraded LY	4	4	4	0	%	$27,523.00	$73,408.00	$45,885.00	166.71%
First-Time 2YA, Level LY	0	0	0	0		$0.00	$0.00	$0.00	
First-Time 2YA, Downgraded LY	4	4	4	0	%	$57,244.00	$18,592.00	($38,652.00)	-67.53%
First-Time LY	94	0	95	95		$0.00	$983,860.00	$983,860.00	
Reactivated LY	35	0	35	35		$0.00	$438,358.00	$438,358.00	
Active 2YA, Lapsed LY	36	36	0	-36	-100%	$398,110.00	$0.00	($398,110.00)	-100%
First-Time 2YA, Lapsed LY	106	111	0	-111	-100%	$1,329,174.00	$0.00	($1,329,174.00)	-100%

Donor Status	2YA Average	LY Average	Change in Average	% Change in Average
Active 2YA, Upgraded LY	$0.00	$0.00	$0.00	
Active 2YA, Level LY	$0.00	$0.00	$0.00	
Active 2YA, Downgraded LY	$17,532.00	$7,242.00	($10,290.00)	-0.5870
First-Time 2YA, Upgraded LY	$6,880.75	$18,352.00	$11,471.25	1.6671
First-Time 2YA, Level LY	$0.00	$0.00	$0.00	
First-Time 2YA, Downgraded LY	$14,311.00	$4,648.00	($9,663.00)	-0.6753
First-Time LY	$0.00	$10,356.42	$0.00	
Reactivated LY	$0.00	$12,524.51	$0.00	
Active 2YA, Lapsed LY	$11,058.61	$0.00	$0.00	
First-Time 2YA, Lapsed LY	$11,974.54	$0.00	$0.00	

The Report - Highest Previous Contribution (HPC)

Donor Range Report
Highest Previous Contribution (HPC)
All Contacts; Contribution Frequency: All

HPC Date Range	<$10	$10-$24	$25-$49	$50-$99	$100-$249	$250-$499	$500-$999	$1,000-$4,999	$5,000+	Total Donors
0-3 Months, Multis	0	1	0	0	0	0	0	2	0	3
4-6 Months, Multis	0	0	0	0	0	0	0	0	0	0
7-12 Months, Multis	0	0	0	0	0	0	1	4	53	58
13-24 Months, Multis	0	0	0	0	0	0	0	25	94	119
25-36 Months, Multis	0	0	0	0	0	0	0	11	97	108
37+ Months, Multis	0	0	0	0	0	0	0	61	527	588
Total Multi Donors	**0**	**1**	**0**	**0**	**0**	**0**	**1**	**103**	**771**	**876**
0-3 Months, Singles	1	1	1	2	4	1	0	1	1	12
4-6 Months, Singles	0	0	1	1	0	0	0	0	0	2
7-12 Months, Singles	0	0	0	0	1	0	0	0	0	1
13-24 Months, Singles	0	0	0	0	0	1	0	0	0	1
25-36 Months, Singles	0	0	0	0	1	1	2	2	0	6
37+ Months, Singles	0	0	1	1	8	3	16	19	0	48
Total Single Donors	**1**	**1**	**3**	**4**	**14**	**6**	**18**	**22**	**1**	**70**
Total All Donors	**1**	**2**	**3**	**4**	**14**	**6**	**19**	**125**	**772**	**946**

The Analytics Dashboard

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Visualizing Your Data

The Analytics Dashboard (AD) should be thought of as the “overview” of different facets of your work as a non-profit organization, providing a high-level reference of things like:

- Targeted Email Performance
- Fundraising (contribution) Efforts
- Advocacy Performance

As these items are system-defaults, they cannot be edited but can be cloned for customization.

Advocacy Dashboard
View a collection of stats and charts related to advocacy efforts.

Contributions Dashboard
View a collection of stats and charts related to fundraising performance.

Email Performance Dashboard
View a collection of stats and charts related to email performance this quarter.

Grants Dashboard
View a collection of stats and charts related to grant efforts this fiscal year.

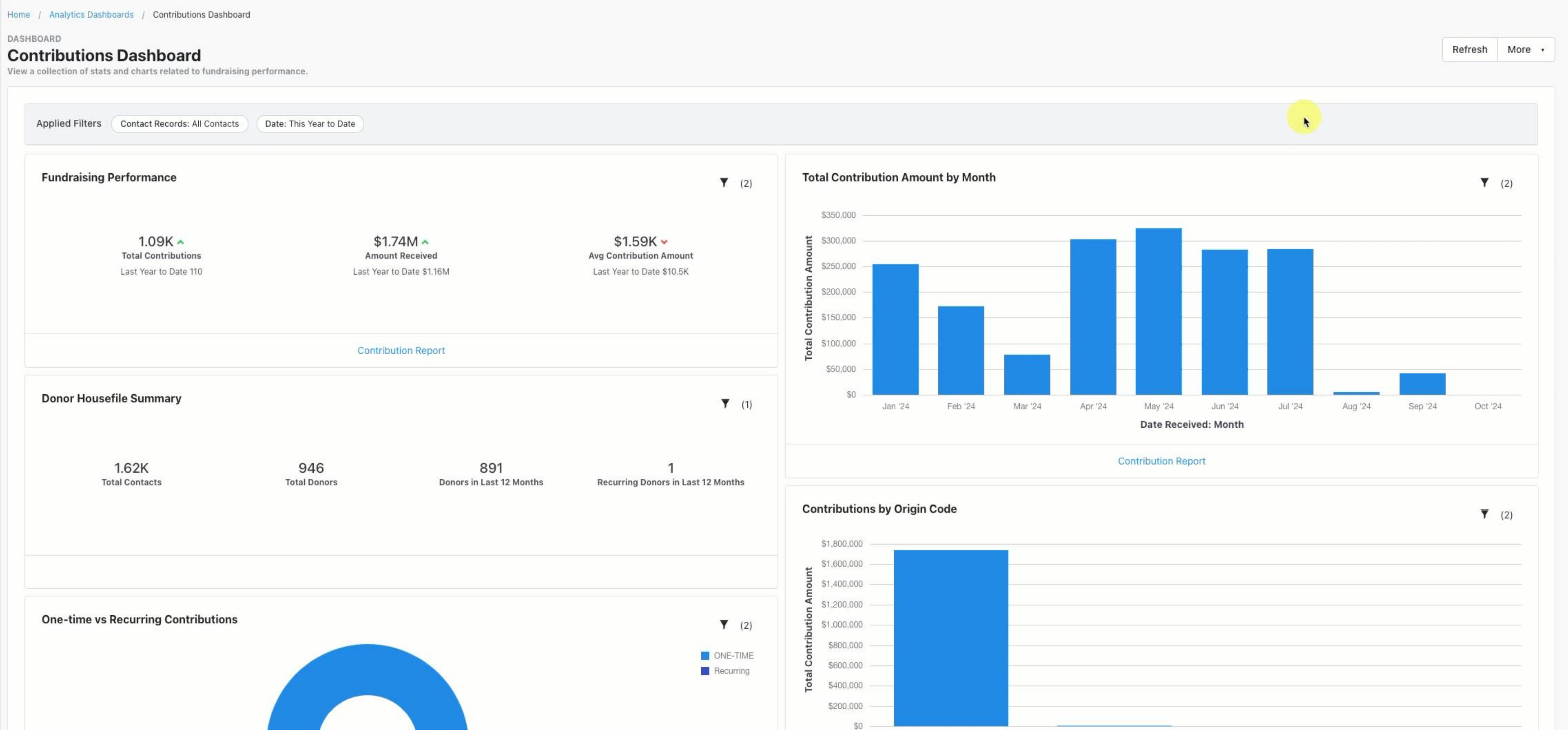
Moves Management Dashboard
View a collection of stats and charts related to major giving efforts this fiscal year.

Online Activity Dashboard
View a collection of stats and charts related to online actions.

Organizing Dashboard
View a collection of charts related to organizing efforts this week.

Planned Giving Dashboard
View a collection of stats and charts related to planned giving efforts this fiscal year.

Reviewing Built In Dashboards

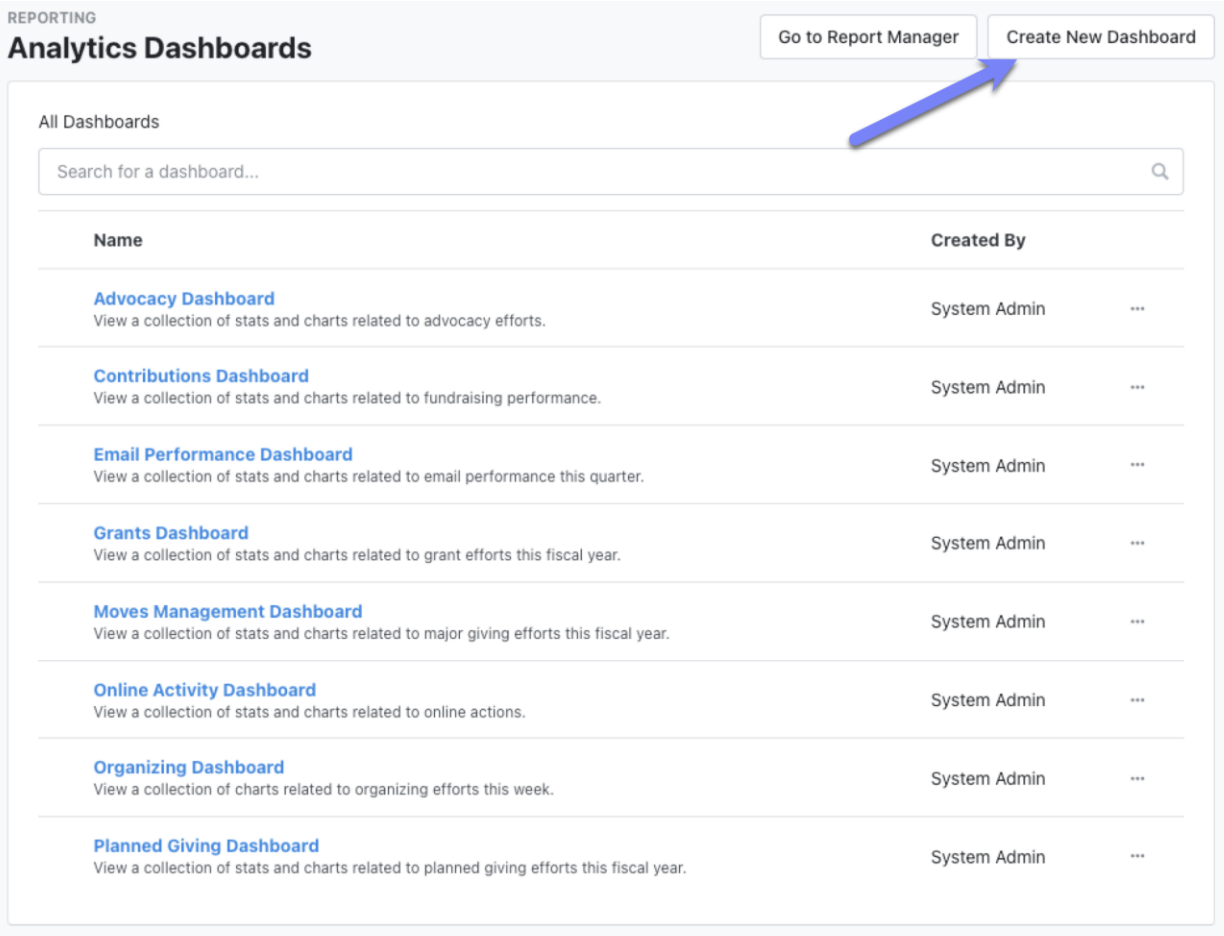


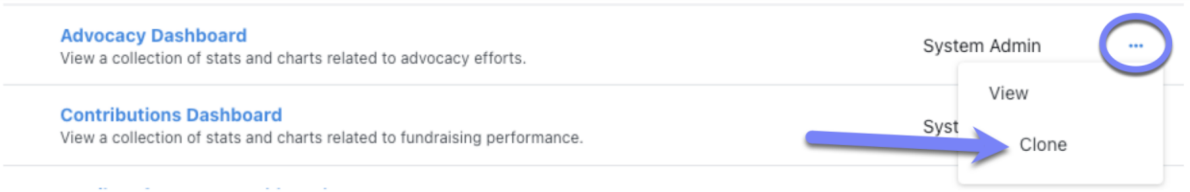
Creating Customized Dashboards

As mentioned, the default dashboards cannot be customized. This does not mean, however, that you cannot create your *own* analytics dashboards.

From the dashboard selection screen, we can either choose to:

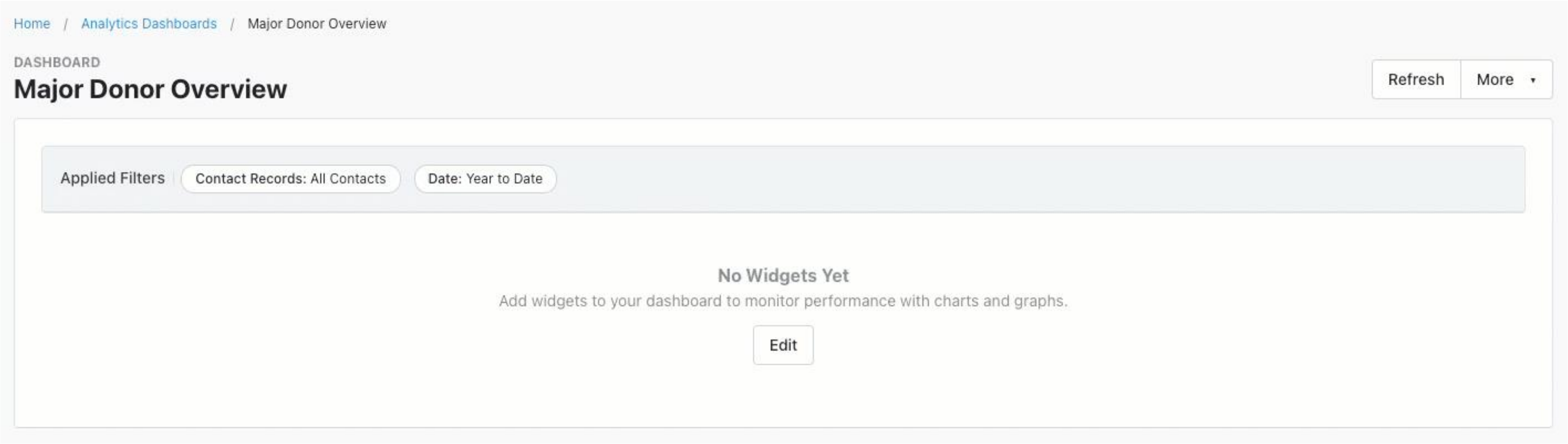
- Clone an existing dashboard using the ellipsis (…) at the far right of any of the system default dashboards
- **Create New Dashboards** using the button at the top right of the screen.





Setting your Filters

When customizing your newly created dashboard, the main edit functions on available will be to filter your current board by date and the Contacts to target. This can be set to capture all contacts globally or to be focused on specific Saved Lists or Searches, as well as to be targeted to campaigns or designations.

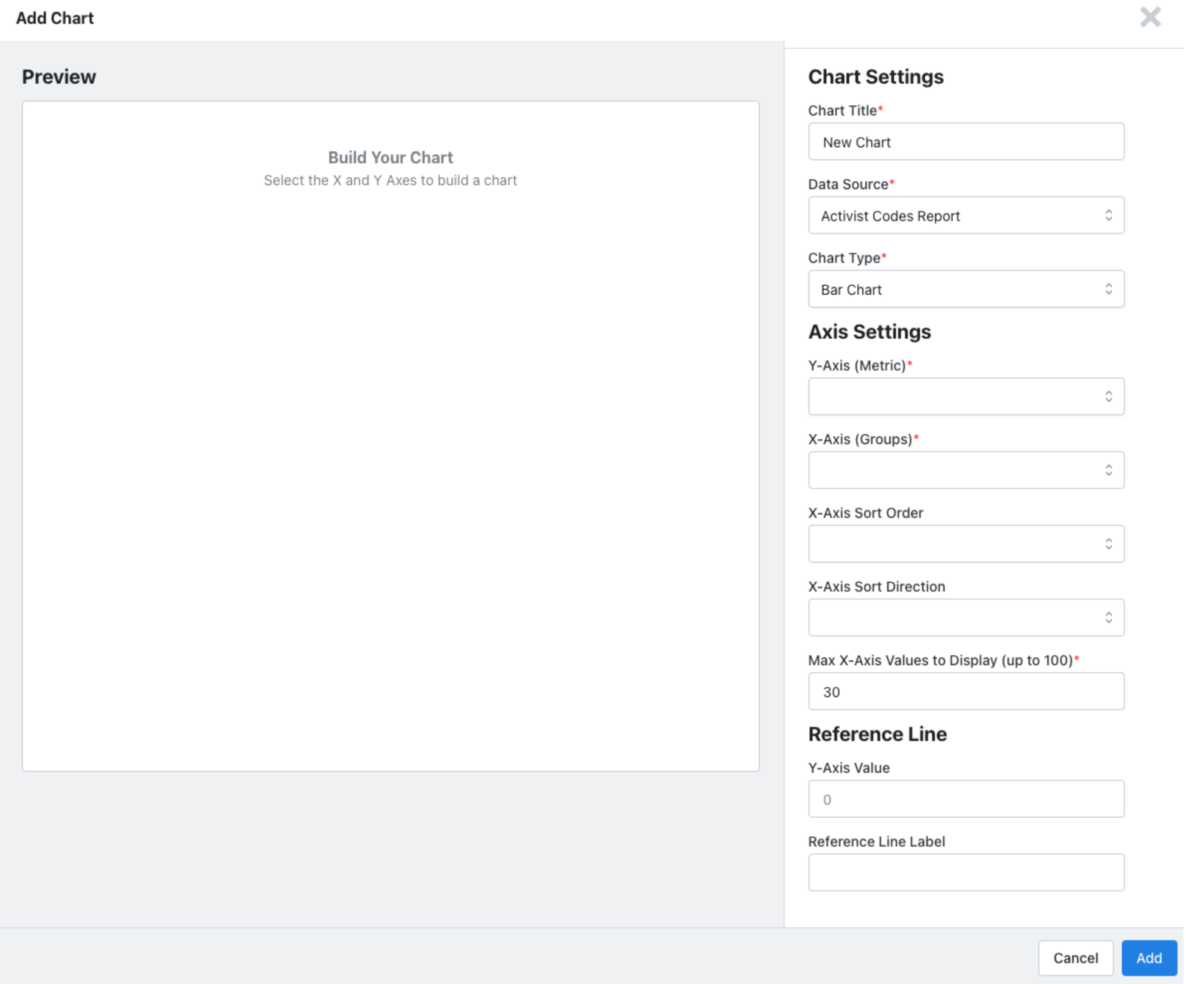


Adding Widgets

The most depth with creating these dashboards comes into play when adding widgets, which will act as your individual infographics and report links.

As the AD is built from the framework of other default reports within EA, we'll be given the option to name the widget, choose what default report this data should be pulled from, and alter its visual layout to your specifications.

This can also be set with a reference line to set your "visual baseline" for your expected output from the widget. For example, an Online Activity Report chart can be shown with a reference line of 100 if this is the common total submission amount that you see on average, or to be listed as a goal.



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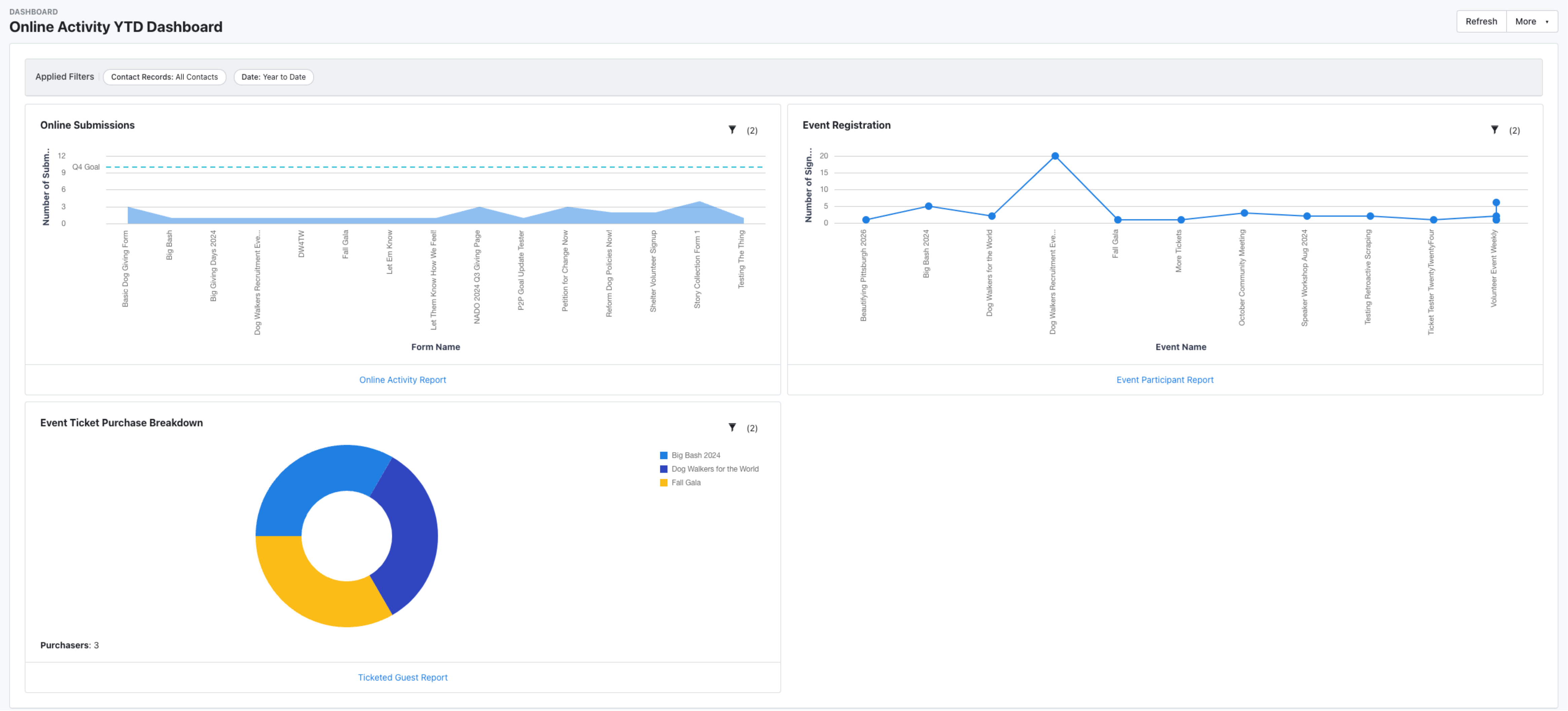
AD Creation Demo



Additional Resources

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Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

Knowledge Base Articles

[Analytics Dashboards]
[The PDF Report Builder]
[Running Reports in the Report Manager]
[Quick Counts and Crosstabs]
[Creating custom Counts and Crosstabs Formats]

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Additional Training

- Bonterra Academy: https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

Thank You for Attending!

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