# Reports Complete Walkthrough

Reports can be accessed through the Admin Panel by selecting Reports on the left-hand side.

Organizing Your Reports

Admin Reports allows administrators to generate, view, customize, and export complex reports to track any element of their campaign. There are approximately 15 reports, all revolving around donation and member/fundraiser information. Admin reports sports a tabbed interface, allowing multiple reports to be open at the same time. The first and default tab is "Reports Home", which features a list of all the available reports. To the left of this list, the same reports appear categorized in folders. To open a report, you can select it either from the reports list or the folders.
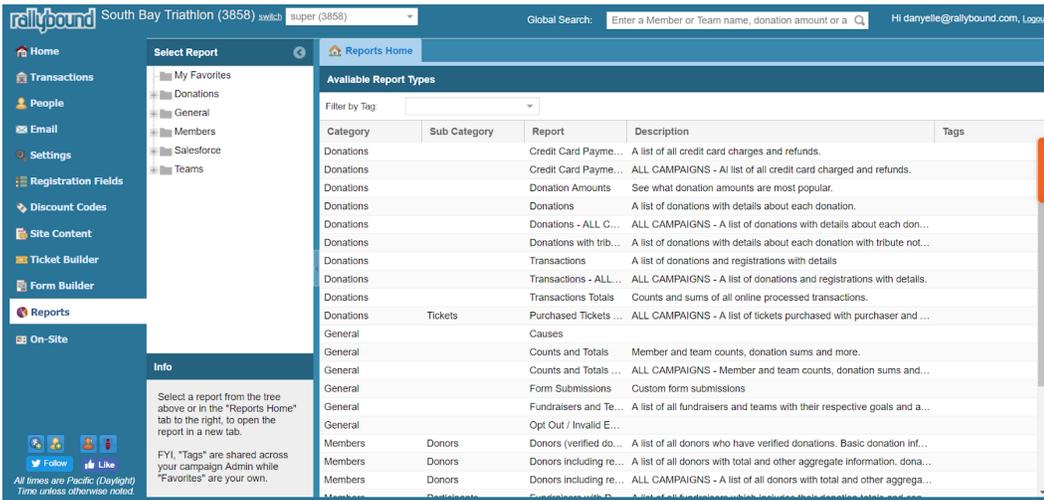

We recommend using the "My Favorites" feature so each user who logs in can easily see the reports they use most frequently. To add a report to "My Favorites", open the report and then click on "Add to Favorites" in the top bar.
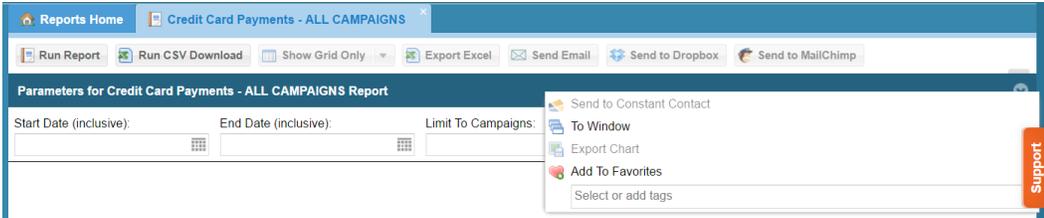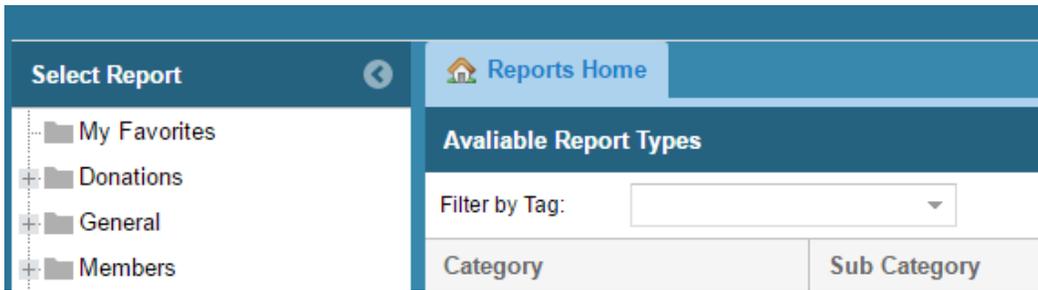

Your favorite reports will appear in the top folder "My Favorites" to the left of the main reports window. Please note, "My Favorites" will only have the view for this specific user.

To create a view that spans the organization you can use Tags. For example, if you want to identify the best reports to be used by Finance you can create a 'Finance' tag. You would do this by selecting the report and then going to "Select or add tags" from the top bar.
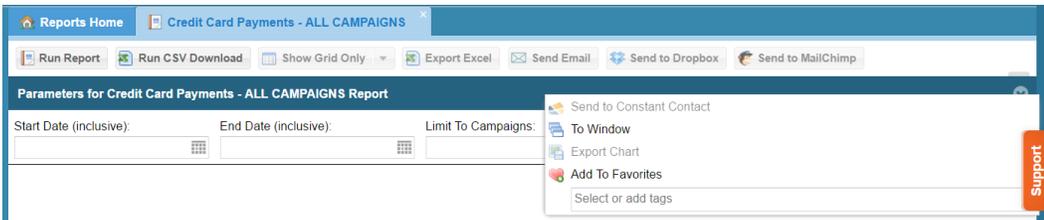
Your tags will appear in reports list, under the tags column. You can filter the reports list to display only those with a specific tag using the "Filter by Tag" dropdown above the reports list.

Select Report	◄	🏠 Reports Home	
My Favorites		**Avaliable Report Types**	
➕ Donations			
➕ General		Filter by Tag:	▼
➕ Members		Category	Sub Category

Report Versions

Many reports have two versions: one version will apply to the given campaign and the other will apply to all campaigns within the platform. These latter reports are differentiated with the term "ALL CAMPAIGNS" in their description.

For customers who have multiple platforms, each platform will have its own applicable ALL CAMPAIGNS report. For a report that pulls information for all campaigns in the organization, a request would have to be submitted for a custom report.

Running Reports

Once you open your chosen report, there you will be able to filter your report by date and campaign to filter down to the specific data you're looking for. Note: the less data included in the report, the quicker it will load. After you've set your parameters, there are three ways you can run your report:

1. Run Report

This will allow you to run the complete report and see it in the Admin Panel window. Through this view you will be able to do the following:

- Sort columns
- Select the columns you want to view
- Choose to Group by a field to organize your data
- Show your data in groups
- Place a filter on your data
- View charts, like grids, tables, and graphs (doesn't apply to all reports)

2. Run CSV Download

This is generally used for reports that contain a large amount of data. The report will automatically download and appear in your computer's "Downloads" folder (unless this has been changed by the Administrator). While the report is being run, a pop-up will display indicating the report is being pulled. Press OK to move past the pop-up box.
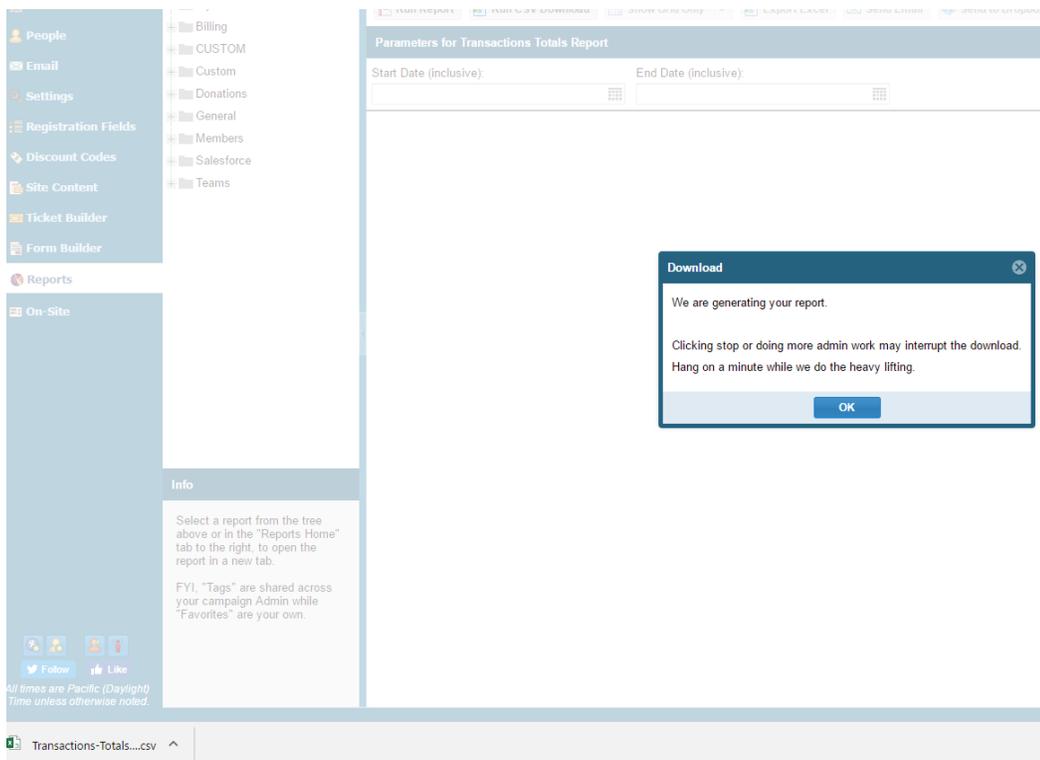
3. Queue Report

This queues the report to run in the background. When the report is ready, you will be notified via email with links to either download the report or load it within the Admin Panel Reports interface for further customization. While the report is running in the background, that report will be disabled in the Admin Panel for that administrator. The administrator can run other reports during this time, can continue working in other Admin Panel interfaces or browser windows, or close the browser window entirely without affecting the queued report.

Report Timeout Information

Reports run for 30 seconds before timing out. If that time is reached, the administrator will be notified in a popup and given the following options:

1. Narrow the search criteria (the report parameters) for a smaller dataset and try again
2. Queue the report to run in the background

If the report is queued, when the report is ready, the administrator will receive an email that includes links to either download the report directly or load it within the Admin Panel Reports interface for further customization. While the report is running in the background, that report will be disabled in the Admin Panel for that administrator. The administrator can run other reports during this time, can continue working in other Admin Panel interfaces or browser windows, or close the browser window entirely without affecting the queued report.

Export Options

The reports interface provides various export options to ensure you can get your report into whatever destination you need. You must have run a report before you are able to execute on these options.

- Excel: Will allow you to export the data being viewed into an Excel Worksheet. You will need to have selected and run a report before an export is possible.
- Send to Email/Send to DropBox/Send to MailChimp: These are different channels to send the data that is selected.

Individual Reports

Rallybound Billing Report

- Available to customers who are not using WePay or Stripe.

- For all other payment processors RallyBound will invoice or charge our transaction processing fee for all online donations on the 1st and 16th of each month. This report will provide details related to that invoice.
  - Statement ID, Date and Time Period
  - Total Donation amount and Statement Amount (RallyBound transaction fee).
  - Payment Information
  - Additional detail on specific payments and RallyBound fee for each transaction amount

Donations

- Credit Card Payments
  - This report contains all credit card charges and refunds. It is the best report to use for finance reconciliations. It is meant to show online payments.
    - Payment ID: an idea associated with a single transaction.
    - Date: Date of transaction
    - Amount: amount of transaction
    - Currency: the currency the funds are made in.
    - Transaction ID: provided by your payment processor and the best to match against with the data from your payment processor.
    - Authorization Code: provided by your payment processor and the best to match against with the data from your payment processor. Not all payment processors will provide an Auth Code.
    - Contact Information and Card Details.
    - Processing fee: the RallyBound transaction processing fees unless the Payment Processor is WePay. In that instance the processing fee will include WePay processing fees.
    - Donation: A value of '1' will appear if the transaction was for a donation.
    - Registration Fees: A value indicating the number of registrations will appear if the transaction was associated with a registration fee.
    - Additional Donation Amount: A value will be included if there is an additional donation amount associated with the transaction.
- Donation Amounts
  - A pie graph that will display the most commonly given amounts. This is commonly used when testing different donation amounts to see what value is most commonly given.
- Donations
  - Includes a line graph over time (you can set parameters) to see trends in terms of giving. It will also include detail on each donation.
    - Donation ID: the ID associated with each donation.
    - Donation Date: the date of the donation.
    - Amount: amount of donation.
    - Amount included: The total amount processed. This value would only be different if the Donor selected to cover processing fees after the Administrator enabled this feature.
- Donations with tribute notifications
  - A list of donations with details about each donation with tribute notifications. This is a section added to the donation form that will need to be enabled by RallyBound. Once this is done, the values captured will appear in this report.
- Transactions
  - Very useful if you want to see registration and donation transactions in the same report but not ideal for finance because it will duplicate the Payment Column.
  - Refunds are included on the transaction report but will be shown twice. The original PaymentID, along with a Refunded PaymentID, will be shown on the transaction with a positive value. There will also be a PaymentID with a negative value.
    - Each instance is essentially a transaction so will have to be documented both times.
- Transactions Totals
  - A summary report like the one below.

Amex	98	14661.19			188.75	14472.44
Discover	9	439.51			5.34	434.17
MasterCard	54	3182.12			51.54	3130.58
PayPal						
Unknown						
Visa	205	19434.35			234.71	19199.64

- Purchased Tickets
  - A list of all tickets purchased with purchaser and recipient info.
    - Includes ID (assigned to each transaction), TicketID (assigned to the specific Ticket Type), Ticket Name, Description, Cost, DonationID, Purchase Date, Purchaser Information and Additional Form Questions.
- Tickets Overview
  - Summary of TicketID's (different ID's for each cost), Ticket Name, Ticket Description, Cost and Number Used.

General

- Causes
  - Organizations can add a cause or list of causes for fundraisers to fundraise for, and for donors to donate to. IF this has been set up in the system, you will be able to pull a report on it here.
- Counts and Totals - a great report that provides statistical information about campaign activity:

  - Avg. Online Donation

- Avg Value of Users (fundraisers and donors) (Total amount raised / (fundraisers + donors))
- Avg. Value of Fundraisers (Total amount raised / total fundraisers)
- % of fundraisers that are Team Captains (team captains / fundraisers (* 100))
- % of total raised by Team Captains (Total amount raised by Team Captains / Total amount raised (* 100))
- % of fundraisers that are Team Members (excluding captains) ((fundraisers on team - team captains) / fundraisers (* 100))
- % of total raised by Team Members (Total amount raised by Team Members / Total amount raised (* 100))
- % of solo fundraisers (solo fundraisers / fundraisers (* 100))
- % of total raised by fundraisers (Total amount raised by fundraisers / Total amount raised (* 100))
- Average Amount Raised by Team Captain
- Average Amount Raised by Team Member (excluding Team Captains)
- Average Amount Raised by fundraiser
- Avg. Donation made to Team Captain
- Avg. Donation made to Team Member (excluding Team Captains)
- Average Amount Raised by solo fundraiser

  Note: Total amount raised by team captains (and by extension: all team members, all fundraisers) includes donations made directly to a team. This amount is not included in the total for team members excluding captains.

- Form Submissions
  - Inputs from custom forms that have been created
- Fundraisers and Teams
  - Quick snapshot on Goal, Team, Contributing Fundraisers, Amount Raised Activity and Member and Team URL
- Opt Out/Invalid Emails
- User Activity Across Campaigns
  - This is a great report for organizations that have run campaigns with RallyBound for multiple years. It will list the users name and contact information, followed by these details (all proceeding with Campaign Name):
    - Campaign Members (anyone who has registered) - yes/no value
    - Attending (physically attending an event or RSVP'ed) - yes/no value
    - Amount Donated (donated by the individual)
    - Amount Raised (total amount raised by the fundraiser, not including the registration fees)

Members

- Donors (Verified Donations)
  - A list of all verified check and cash donations
- Donors including registration fees
- Fundraisers with Donation and Contacts Summary
  - Information on Fundraisers, to include:
    - Contact Information
    - Registration Date
    - Goal Amount
    - Page Active (means their page is displayed)
    - Amount Raised
    - Donations Towards Goal
    - Registrations Towards Goal
    - Total Amount Raised Online and Offline
    - Team Information
    - Activity on Fundraising Campaign
      - Uploaded profile picture, connected to social account, edited personal page, customized URL, verified email, recommitment state and custom registration questions
- RSVP Product Details
  - A graph and worksheet that contains registration responses. Administrators can Limit Products (search for a specific response) or to pull all results together.
- Registrants that have not RSVPed
  - Generally used for Quick Registration when RSVP is not mandated.
- Registrant with Reg Fields, Donation and Contacts Summary

- Purpose of this report is to provide information about the fundraiser.
  - Name, email, address information (address given through registration and not billing address), registration details, donation statistics (how much they raised, what their goal is, whether their page is active), custom fields that have been added through forms or registration fields, and how engaged they are in fundraising (contact count, emails sent and social connections).
  - Amount Raised is the amount of donations
  - Total Amount Raised is the amount of donations + registration fees

Salesforce

- Salesforce Sync Donations
  - Donation details
    - DonationID, Date and Amount
  - Donor details
    - DonorID, First and Last Name, Donation to GoalID,
  - Member/Fundraiser Donated to Details
    - Member First and Last, Team
  - Salesforce Sync Details
    - Synced Date, Salesforce ID, Secondary Salesforce ID
- Salesforce Sync Members
  - Similar to Salesforce Sync Donations but speaks specifically to contact information for Fundraisers
  - UserID, First and Last Name, Email

- Salesforce Sync Details
  - Synced Date, Salesforce ID, Secondary Salesforce ID

Teams

- Teams with Summary
  - Information on teams, to include the campaign, Team ID and Name and other details related to the Team's activity:
    - Fundraisers, RSVP, Team Total, Date Established, Amount Raised, Registration Total, Goal and count of custom field responses

Data Fields

Common data fields that are stored include:

- DonationID
  - RallyBound ID given for every donation made. If one person makes multiple donations there will be a separate DonationID associated with each Payment.
- RegistrationID
  - RallyBound ID given for every registration made. There will be a unique ID for each person that is registered.
- PaymentID
  - RallyBound ID given for each individual payment made. For example, in John Doe registers three people and donates all in one payment there will be a single PaymentID, three RegistrationIDs and one DonationID.
- RefundedPaymentID
  - RallyBound ID provided for each Refunded Payment. A payment cannot be "undone" so when an initial payment is made it will be assigned a PaymentID. When a refund is issued, a second PaymentID will be provided that will appear as a RefundedPaymentID.
- TransactionID
  - Value assigned by your payment processor for each transaction that takes place.
- AuthCode
  - The code provided through your payment processor authorizing payment for credit card purchases. The AuthCode and TransactionID are what should be used for financial reconciliation.
- Transaction Type.
  - There are three donation types: Fundraising (donations are made to a fundraiser) Registration (donation given at the time of registration) and a General Donation.
  - The fourth transaction type is a Registration fee.

Data Dictionary

1. DonationID : RallyBound ID of the donation.
2. TransactionID : RallyBound ID of the transaction (registration fee/donation).
3. Payment ID - RallyBound ID of the payment record (for either a donation or registration fee).
4. Registration ID - RallyBound ID of the registration record. Record can be found in People > Registrants tab.
5. Donor ID - RallyBound ID of the donor record. Record can be found in People > Donors tab.
6. Group Member ID - Group Member ID is the member record ID (ex: donor record, registration record) in a campaign group.
7. RallyBound Member ID - RallyBound Member ID is the member record ID (ex: donor record, registration record) in RallyBound system. If the campaign is in a group, then same as Group MemberID.
8. Payment Amount - Total amount of the transaction. Say you have registration fee($25) and you made an additional donation($25). In this case, the payment amount will be $50.
9. Amount - Amount paid for each individual action. In the case above, the amount for each transaction (registration and additional donation) will be $25 each.
10. User ID - ID of the user record. DonorID for donor record and Registrant ID for registrant record.
11. Member ID - ID of the member record either fundraiser of attendee. In any case the registrant ID (not registration record ID).
12. Payment Date - Date the payment was made. In case of offline donation(check/cash), the payment date will be the date when the check/cash donation was received.
13. Date - Date the donation was added. In case of offline donation(check/cash), the date will be the date when the donation was entered in the system.
14. HeDonated - Amount the registrant donated as a donor.
15. HeDonated Reg - Amount the registrant donated during registration (Additional donation amount).
16. Registered by first name, registered by last name (when is this different than the first name and last name fields?) - On step 3 of the registration, a registrant can add additional registrants on their team. For all the additional registrants, the registered by name will be the primary registrant name.

RallyBound IDs

Campaign Name	Description
DonationID	ID given for each donation that occurs
RegistrationID	ID given for each registration record created

PaymentID	ID Associated with a payment. There can be one Payment ID for several transactions (multiple donations and registrations)
Refunded PaymentID	ID Associated with a refunded payment. When a refund occurs there will be a Payment ID and a Refunded Payment ID issues.
Recurring Donation ID	ID Associated with a recurring donation
TransactionID	ID/code that comes back from the processor after a transaction. Similar to the Payment ID where it can be tied to more than one transaction (donation/registration) but indicates the transaction took place at one time.
Donor UserAccountID	
DonorID	ID associated with a donor.
UserAccountID or Global Member ID/Group Member ID	ID Associated with a useraccount. This is anyone in the system: donor, registrant or contact. This is different from a registrant or donor ID. This is the universal ID given to a contact across an organization.
MemberID	ID associated with a fundraiser.
GoalID	ID Associated with a goal
TeamID	ID Associated with a team
TeamGoalID	Team's Goal ID
Donation To GoalID	A Goal ID to whom the donation was credited.
TicketID	ID Associated with a ticket.
StatementID	ID given for each statement, or billing invoice, that goes out.