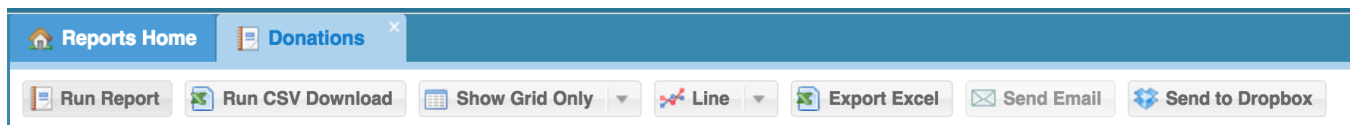


How to generate and export a report

Admin Reports allow administrators to generate, view, customize, and export complex reports to track any element of their campaign. To get started with reports, follow these steps:

1. Log in to the Admin at admin.rallybound.com.
2. Navigate to the campaign on which to run a report
3. Click the "Reports" tab
4. Select a report from the list (the main two reports are "Donations", and "Registrants with Products, Donation, and Contacts Summary" in the Report column). This will open a mostly-empty panel.
5. Enter begin and end dates and set relevant parameters for your report. The more specific your report parameters are, the quicker it will load.
6. Run Report Options:
 - a. To run the report, click "Run Report" in the top left.
 - b. To download the report directly without generating the report in this window, click "Run CSV Download".
 - c. To queue the report to run in the background, click "Queue Report". When the report is ready, you will be notified via email with links to either download the report or load it within the Admin Reports interface for [further customization](#).
7. To customize the report once it's been generated see [How to customize a report](#).
8. To export your report, click "Export Excel" at the top. (If you have connected other services through our integrations, you may have the option to send the report directly to Dropbox, or to push the list to MailChimp.)
 - For most users the "xml" file will work best - just open it in Excel.
 - If you're having trouble with the "xml" file, download the "xls" file. (If you get a warning about a wrong file extension, choose to open the file.)
 - For Mac OS and Google Docs, please download the "csv" file.



Timeout information

Reports run for 30 seconds before timing out. If the timeout is reached, the administrator will be notified 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 Reports interface for [further customization](#). While the report is running in the background, that report will be disabled in the Admin for that administrator. The administrator can run other reports during this time, can continue working in other Admin interfaces or browser windows, or close the browser window entirely without affecting the queued report.