

# DATA AND REPORTING

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# SUB LINKS UNDER DATA

**In this course you'll learn how to understand your account data in more detail and how to access our extensive reporting tools.**

- **LOOKUP SUPPORTER**

- Where you can manage your supporter records and details.

- **EXPORT**

- Where you can build a query from certain criteria and export that supporter data.

- **IMPORT**

- Where you can bring in Supporter Data via CSV files that are UTF8 encoded.

- **DELETE**

- Where you can bring in Supporter Data to do a bulk deletion.

- **MANAGE DUPLICATION**

- Area where it automatically identifies possible duplicate records in your account and helps you to merge them.

- **PROFILES**

- used to segment your supporters into groups.

# SUB LINKS UNDER REPORTS

In this course we'll introduce you to our visual, and data reporting which allows you to create quick snapshots and longer term reports on your campaigns.

- **VISUAL**
  - allow you to view your results graphically within the software from your emails and campaigns.
- **DATA**
  - allow you to download summary spreadsheets of results from your emails and campaigns, or have them emailed to you on a schedule

# INTEGRATION

## FINANCE

**In this course you'll learn how to understand how to generate reports and data regarding transactions and fundraising information.**

- TALLY VIEW
- FINANCE REPORTS
- RECEIPT INVENTORY LOG
- ANNUAL RECEIPTING
- IMPORT FINANCIAL TRANSACTIONS
- IMPORT MEMBERSHIP TRANSACTIONS
- SINGLE TRANSACTION RECEIPTS

## INTEGRATION

**Here is where Engaging Networks works in conjunction with your database of record.**

- EXTERNAL CRM SEGMENTS
- API OPTIONS

# Thank You!

Do you have any Questions Regarding Data & Reporting?

You can reach out with your questions in the future to [support@engagingnetworks.community](mailto:support@engagingnetworks.community)