

ADVANCED REPORTING FEATURES

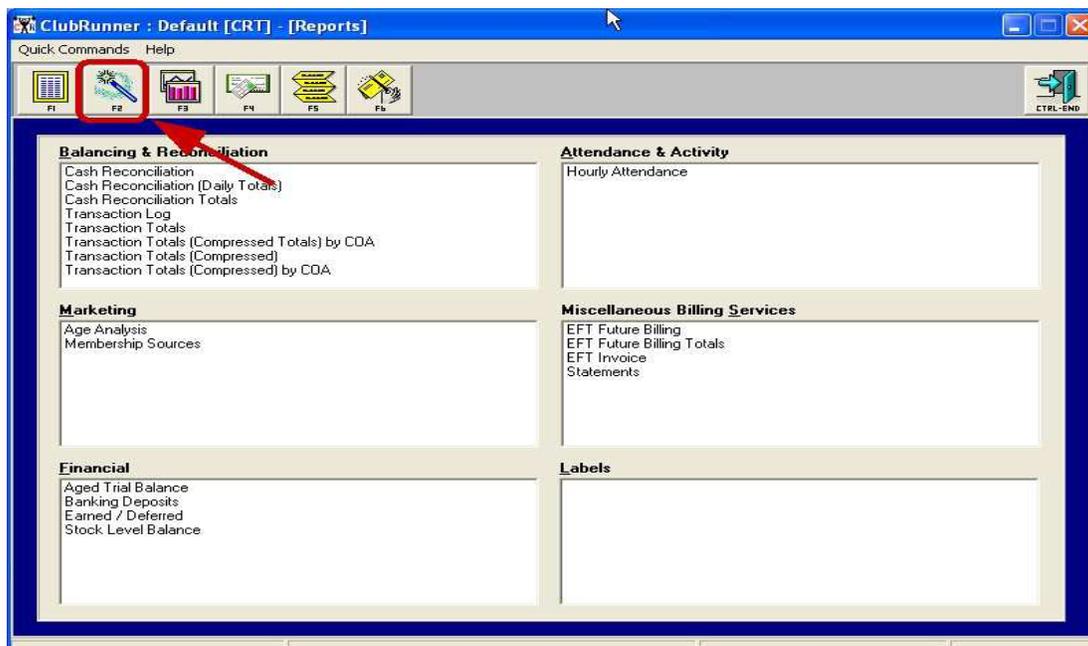
ClubRunner has many advanced reporting features that are simple to use, and very powerful in their results.

Sending report results to a Member or Guest Search

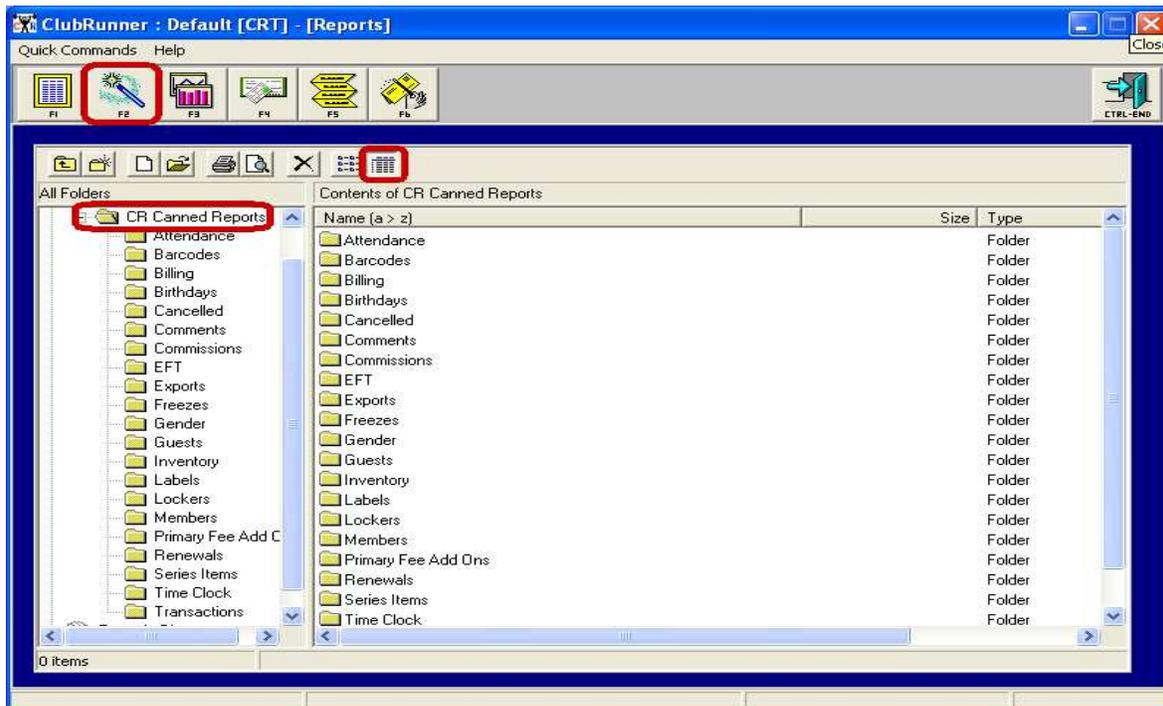
This is one of my personal favorites. ClubRunner offers a wide variety of reports in the CR Canned Reports folder (about 50,000 if you permeate them). These reports have been composed and collected over many years, and you should always be able to find a particular report that you're looking for. But, even if you find a report that gives you the results you want, that report may not be displaying what you need to view. For example, you may run a report that gives you all new members in the last month, but the report does not include phone numbers. Rather than change the reports output, which is somewhat tedious, there is a better way...



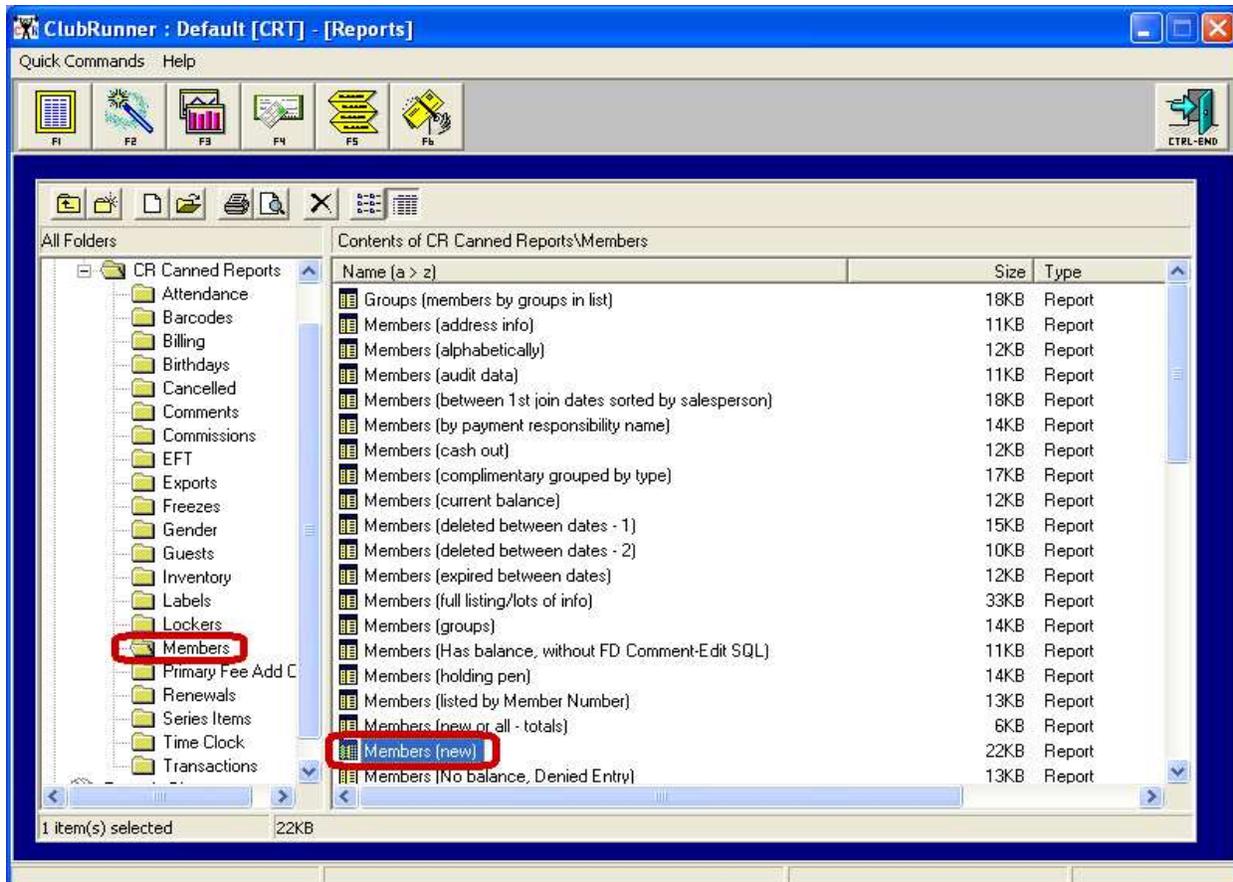
Once in Reports, enter in to "your" reports, the F2 Wizard Wand...



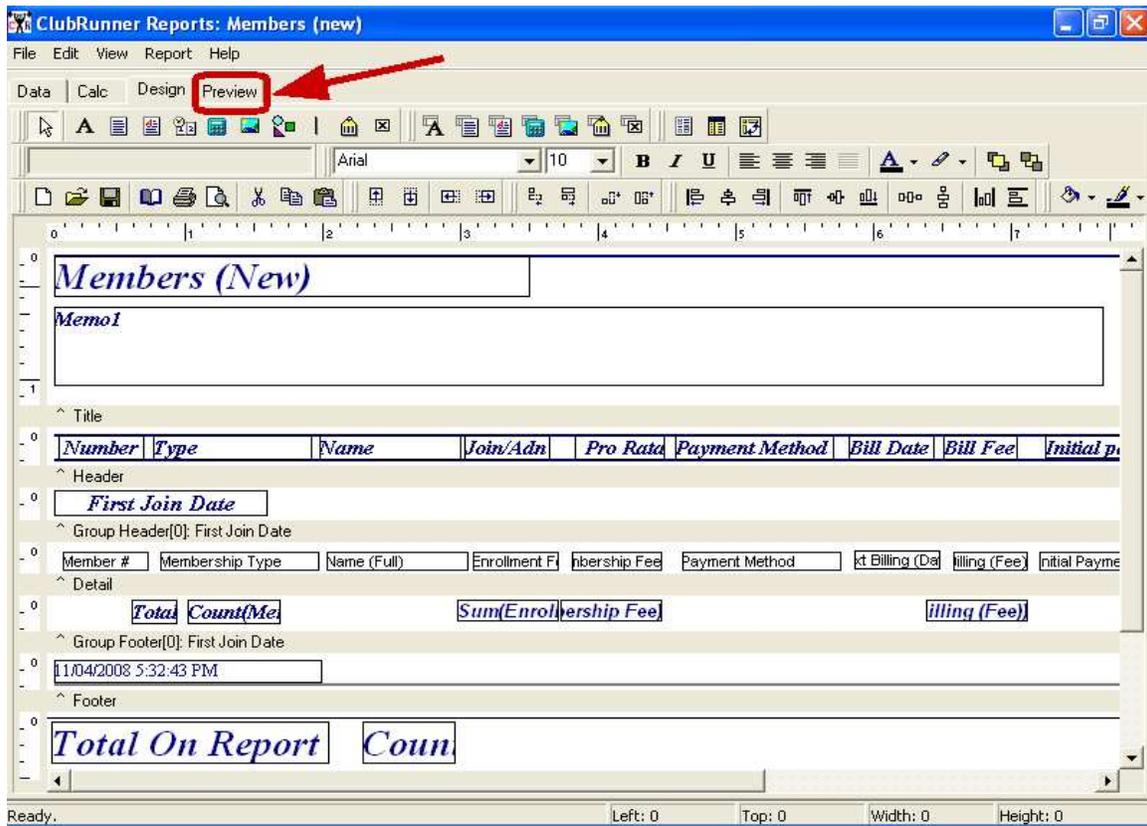
Then, find the report that yields the “results” that you want, but maybe not the printed fields that you want to view...



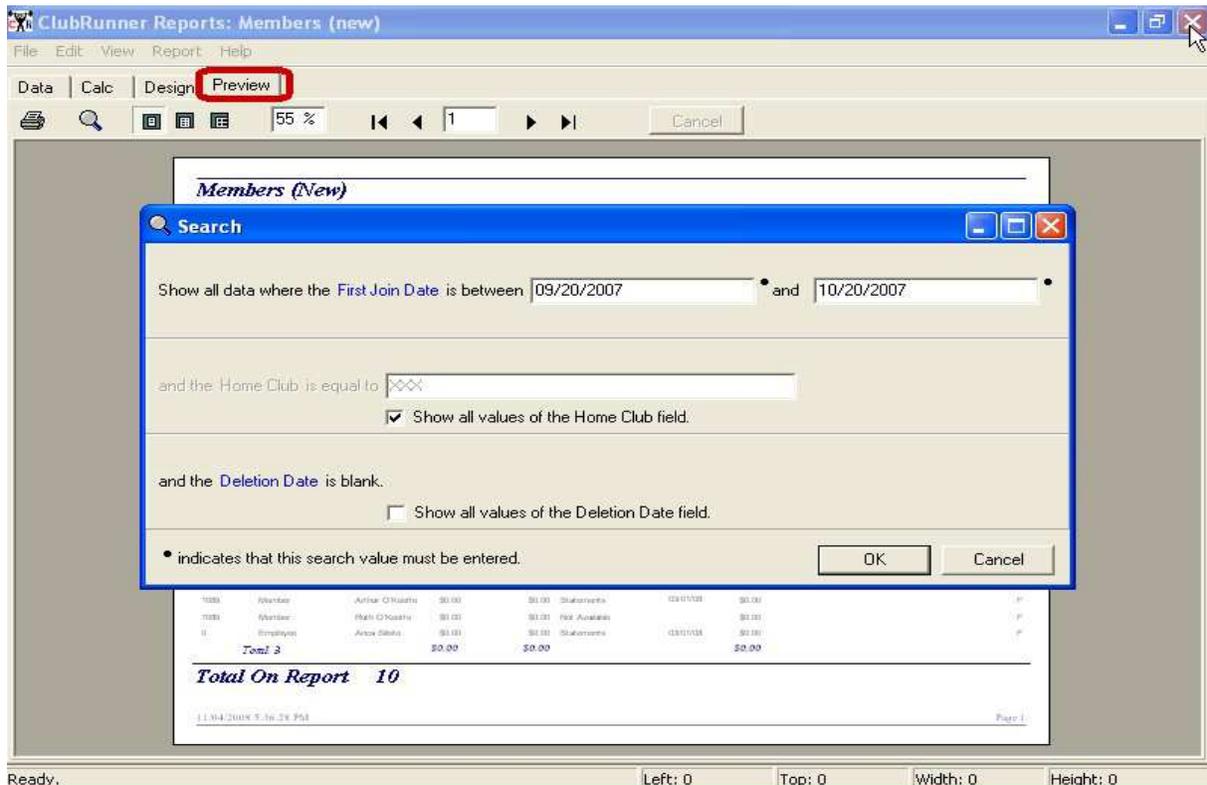
We'll pick a report from the “Members” folder...



Instead of “running” the report, we’re going to “open” it up by double clicking on the report icon to the left of the report title...We’ve opened up the actual report, but we need to move to the “Preview” tab...



Now we'll run the report...



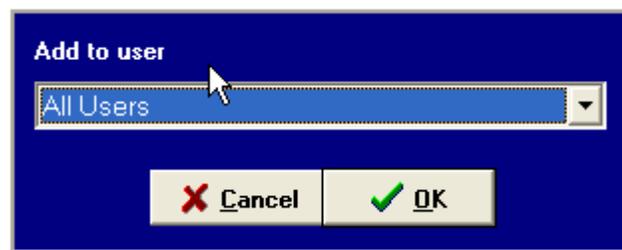
Members (new)

Show all data where the First Join Date is between 09/20/2007,10/20/2007 and the Home Club has any value.

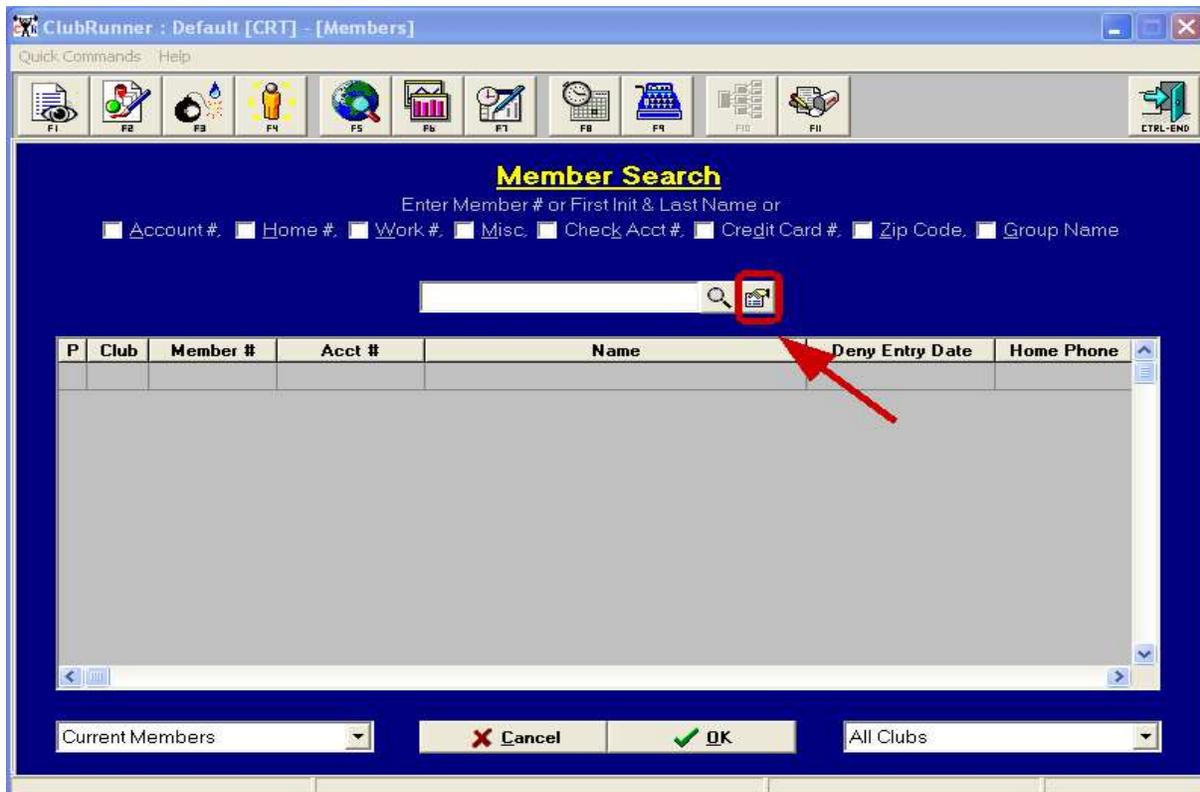
Number	Type	Name	Join/Adn	Pro Rata	Payment Method	Bill Date	Bill Fee	Initials
10/02/07								
1131	Member	Carl Kah	\$0.00	\$0.00	Not Available		\$0.00	
1131	Member	Shirley Kah	\$0.00	\$0.00	Not Available		\$0.00	
Total 2			\$0.00	\$0.00			\$0.00	
10/10/07								
1200	Member	Jane M. Perkins	\$0.00	\$0.00	Statements	03/01/08	\$0.00	
Total 1			\$0.00	\$0.00			\$0.00	
10/11/07								
1010	Member	Edward Stone	\$0.00	\$0.00	Not Available		\$0.00	
1010	Member	Lollie Stone	\$0.00	\$0.00	Not Available		\$0.00	
Total 2			\$0.00	\$0.00			\$0.00	

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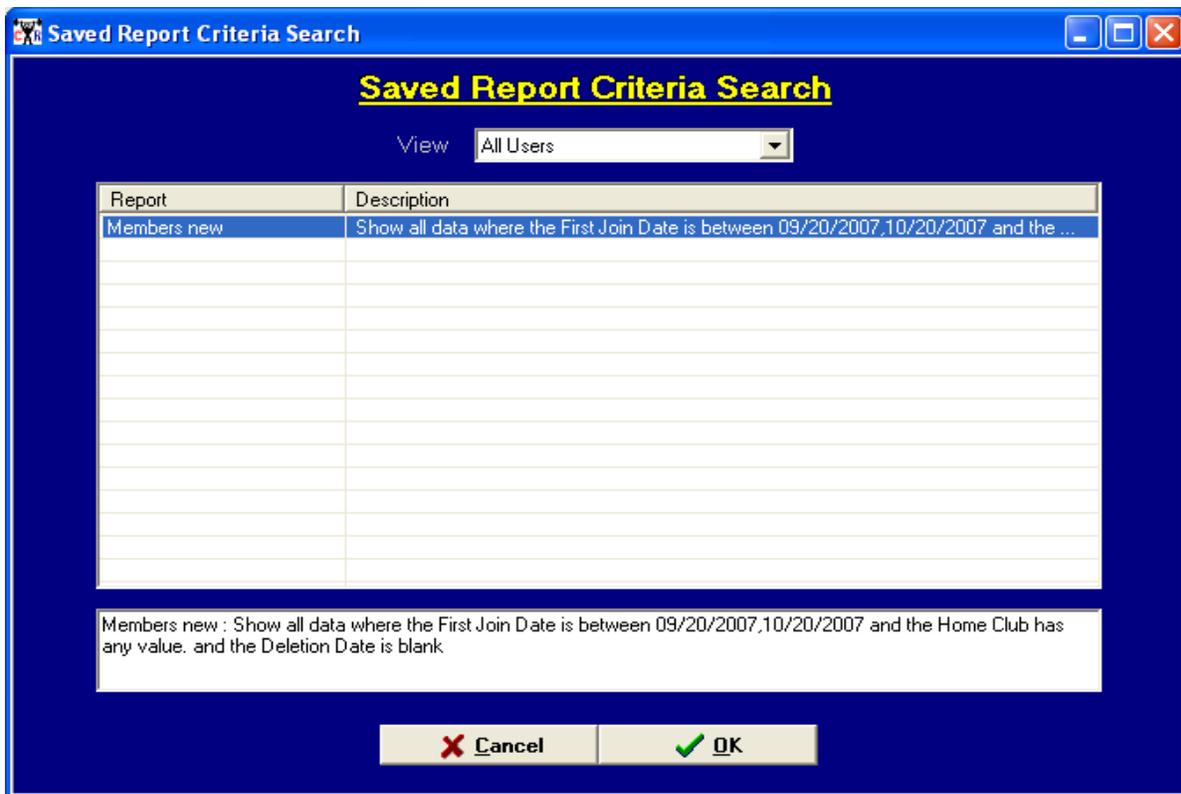
This report is exactly who we want to see, but it isn't what we want see. Most of the employees in a facility have access to a computer, and here's how we'll take advantage of this...Click on the first ClubRunner Menu choice, **"Save to Member Search"**. Then determine which User or Users that you want to allow access to this report's results...



Highlight your report and click OK...



Select the User, highlight the report results that you want, and click “OK”...



You'll get a list in the Member Search results grid, exactly as if the report had been printed. However, now you have access to all of each member's information...

ClubRunner : Default [CRT] - [Members]

Quick Commands Help

Member Search : Members new
 Enter Member # or First Init & Last Name or
 Account # Home # Work # Misc Check Acct # Credit Card # Zip Code Group Name

Search: _____

Acct #	Name	Deny Entry Date	Home Phone	Join Date	PL
2532	Carl Kah	11/18/2074	626-5466	10/02/2007	
2531	Shirley Kah	11/18/2074	626-5466	10/02/2007	
2534	Jane M. Perkins	11/18/2074	626-1069	10/10/2007	
2535	Edward Stone	11/18/2074	626-8344	10/11/2007	
2536	Lollie Stone	11/18/2074	626-8344	10/11/2007	
2537	Daniela Baumgartner	11/18/2074		10/18/2007	
2538	John Wilke	11/18/2074		10/19/2007	
2539	Arthur O'Keeffe	11/18/2074		10/20/2007	
2540	Ruth O'Keeffe	11/18/2074		10/20/2007	
2541	Anca Siliste	11/18/2074	203-570-4979	10/20/2007	

Current Members [v] [X] Cancel [v] OK All Clubs [v]

The results in the search are in the order that the report was produced, in this case in "Join Date" order. Pick the 1st member, and now you have access to all of his/her information...

ClubRunner : Default [CRT] - [Members]

Quick Commands Help

Personal Info Extended Info Financial Summary Contact FD Messages Notes

Acct #2532 Mem #1131 Carl Kah

Editing Last Entered : CRT

Member # 1131 Type Member Barcode # _____
 (Ctrl-P to Change Prefix)

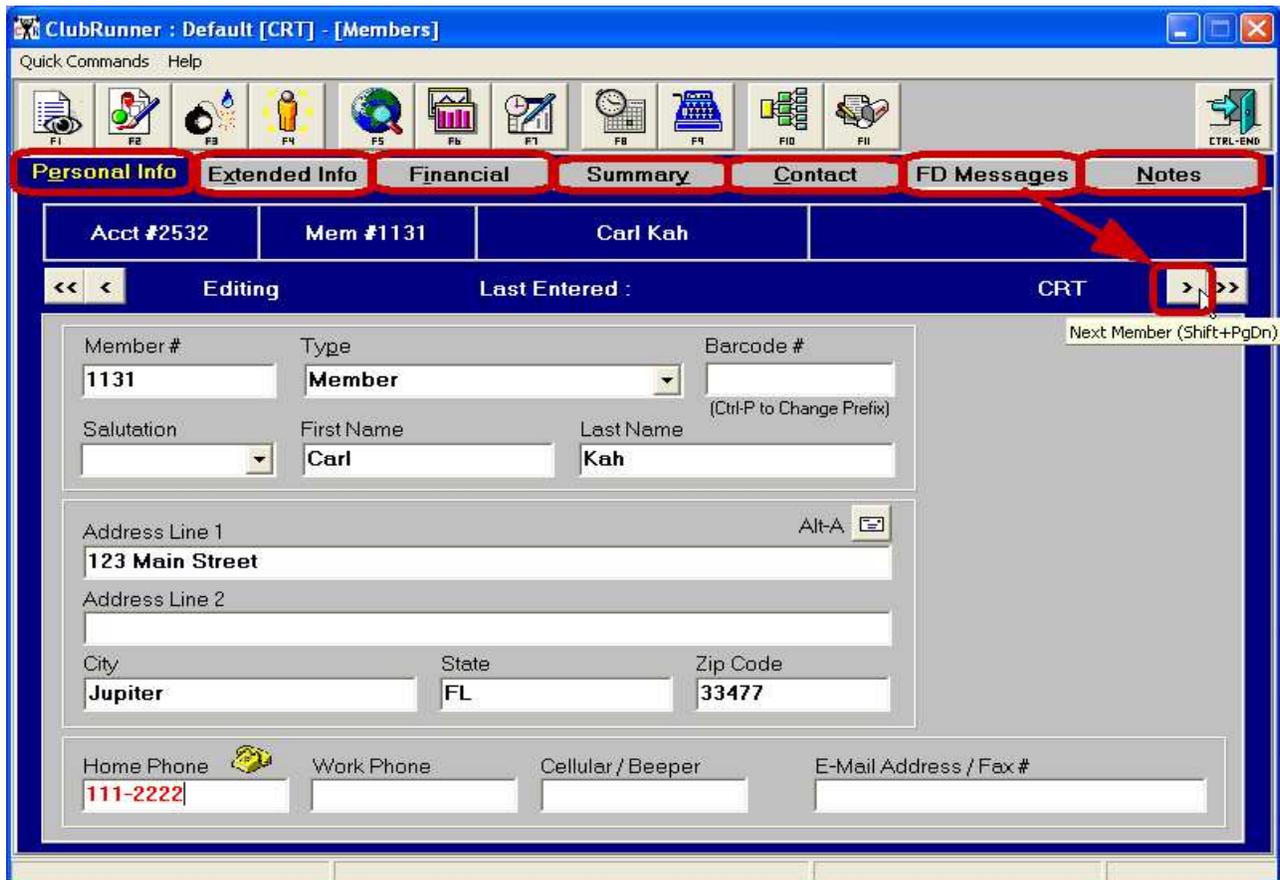
Salutation _____ First Name Carl Last Name Kah

Address Line 1 123 Main Street Alt-A [v]
 Address Line 2 _____

City Jupiter State FL Zip Code 33477

Home Phone 111-2222 Work Phone _____ Cellular / Beeper _____ E-Mail Address / Fax# _____

After you are finished with this member, move to the next one in the report by clicking on the “Next Member” arrow...



and going “down” the search...

