

Report Tips and Tricks

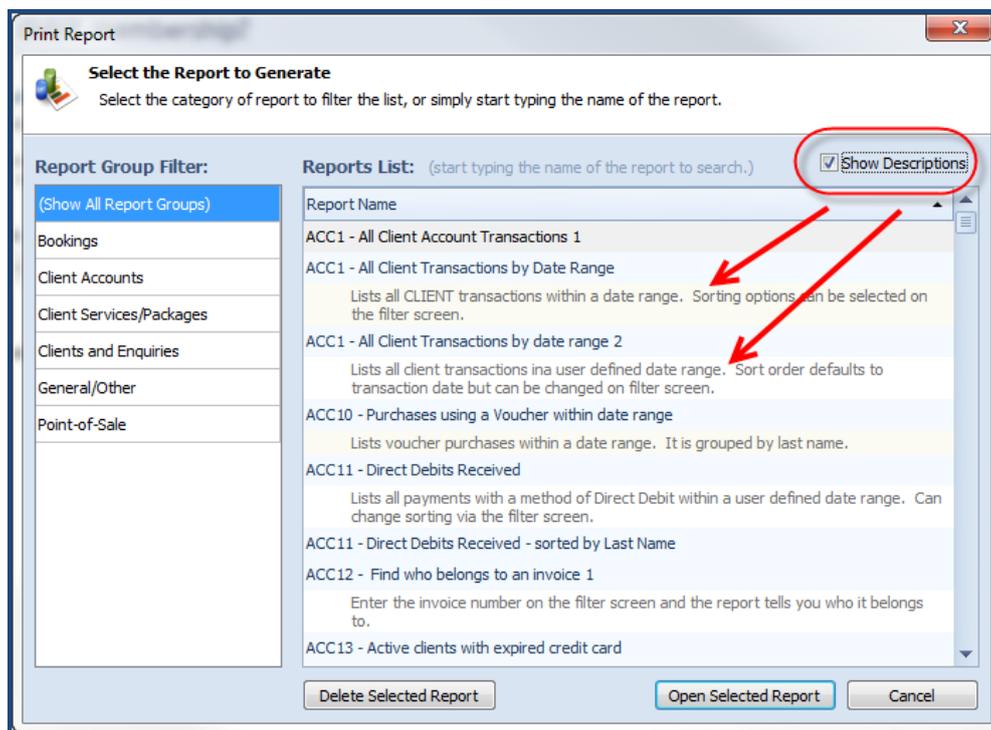
Here are some of our top tips when using the Reports library. If the item you want is not listed here, please check out the Online help using the 'F1' key in ClientConnect, or contact Support.

- [Report Descriptions](#)
- [Delete a Report](#)
- [Keep date ranges](#)
- [Membership statistics](#)

What's in the Report?

To find out what is in a Report, without having to actually run it first, use the Report Description. The description should help you decide whether the report will be useful in obtaining the information that you require.

To turn on this option, go to the Reports tab and click on the top half of the 'More Reports' button. You will then have a checkbox for "Show Descriptions". Turn this checkbox 'on' to see the descriptions for the reports in your personal report library.



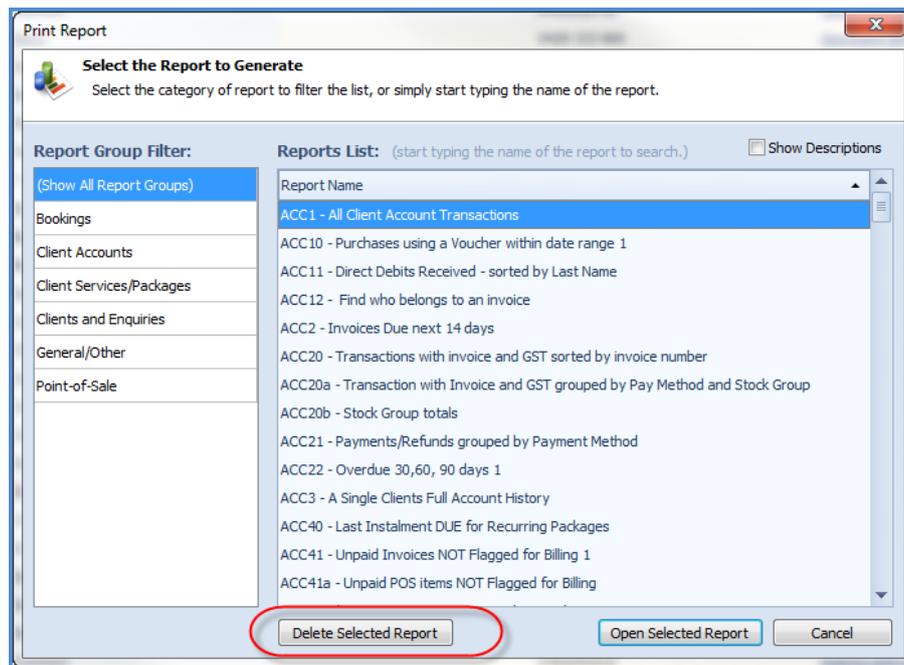
NOTE that you will need to turn on this checkbox each time you open this window. If you do not see any report descriptions, you may need to delete and re-load the report, as descriptions are always being added and updated.

Deleting Reports

If there are reports that you don't use, you can delete them from your personal report library. If you feel you need a particular report again, you can simply download it from the Online Report Library. This helps to keep your report area from becoming filled with superfluous reports.

Go to the Reports tab and click on the top half of the "More Reports" button. You will then see the list of all the Reports you have downloaded to your personal reports library.

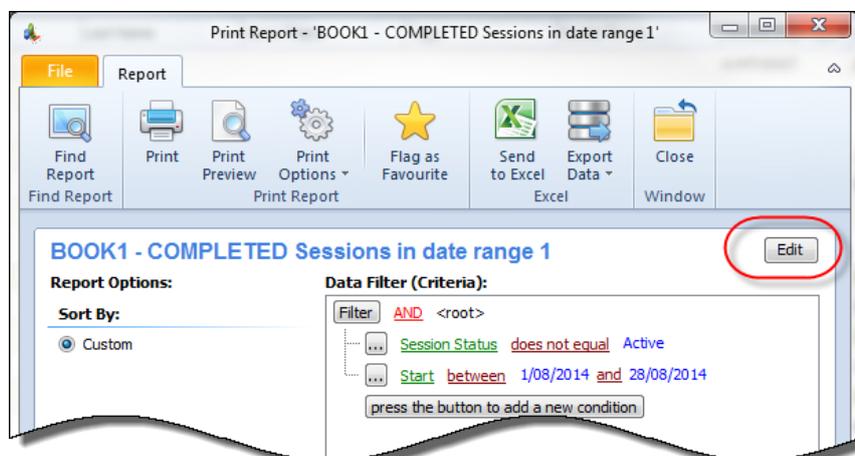
Highlight the report that you wish to delete and click on the "Delete Selected Report" button.



Keep your date ranges on a filter

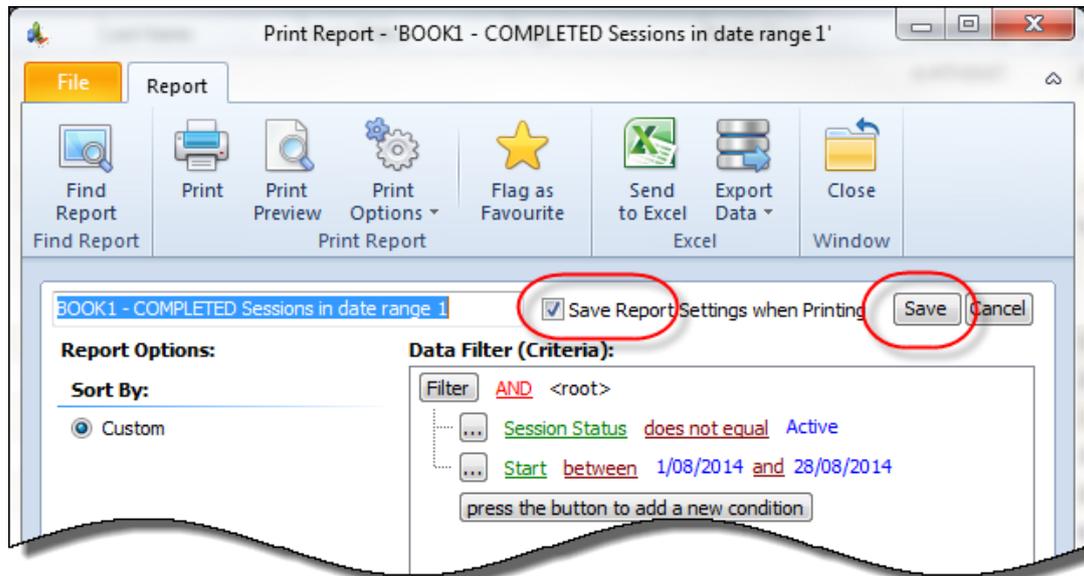
Some of the reports in ClientConnect require you to enter a date range.

To ensure that you don't have to re-enter these each time you run the report, click on the 'Edit' button on the filtering screen.



Ensure that the tickbox for 'Save Report Settings when Printing' is turned ON.

Then click on 'Save' to save the current settings for that report.



When you next open up that filtering screen, your previously used date range should remain.

Membership Statistics

There are a suite of reports to help you find information about your Membership Sales, Cancellations, Renewals etc. These reports start with the code 'MEM', so have a look through these.

Some of the more commonly used include:-

MEM1 - New and Renewed memberships in date range

MEM6,7,8 - Membership Sales reports

MEM9 - Cancelled Membership in date range

MEM10 - Members Expired in date range

MEM21 and MEM22 - Net Member Number Change in date range