

Steps to generate Chapter EYA's Report

1. Login as admin
2. Goto Dashboard > Members > Saved searches
3. From all the EYA chapters list select the required chapter for which you want to generate report, and click on Run

Ex: EKAM Atlanta EYA's, EKAM Boston EYA's

The screenshot shows the 'Member list' page in the Personify dashboard. The 'Saved searches' tab is active, displaying a table of saved searches:

Search name	Search parameters	Created by
EKAM Atlanta EYA's	Select a Chapter is 'Ekam Atlanta, GA'	Pravallika CH 09/11/2021 Delete search
EKAM Austin EYA's	Select a Chapter is 'Ekam Austin, TX'	Pravallika CH 09/14/2021 Delete search
EKAM Bakersfield EYA's	Select a Chapter is 'Ekam Bakersfield, CA'	Pravallika CH 09/14/2021 Delete search

4. Now all the selected chapter EYAs will be listed
5. You can click on each EYA member to see the details, and also click on export to generate excel report for those members

The screenshot shows the 'Member list' page with search filters applied. The search name is 'EKAM Atlanta EYA's', layout is 'Default layout', and sort by is 'Last name'. The search criteria are: 'Select a Chapter' is 'Ekam Atlanta, GA'. The search results show 11 records found:

Member Name	Membership Level	Member status	Email	Last login
Chalia, Sreeja	EKAM Youth Ambassadors	Active	sreejachalia@gmail.com	11/14/2021
61977086	Individual	Never	Fully subscribed	
Dhivakar, Rithik	EKAM Youth Ambassadors	Active	rithikdhiva@gmail.com	10/24/2021

Steps to generate Chapter Adult Volunteers Report

1. Login as admin
2. Goto Dashboard > Members > Saved searches
3. From all the chapters list select the required chapter for which you want to generate report, and click on Run
Ex: EKAM Atlanta Adult Volunteers, EKAM Boston Adult Volunteers

Personify WildApricot

Summary List **Saved searches** Reports Levels Groups Membership fields Member emails Card Polls

Custom result layouts

Back

Member list

Summary Keyword search Advanced search Saved searches

Search name	Search parameters	Created by
EKAM Atlanta Adult Volunteers Run Default layout	Select a Chapter is 'Ekam Atlanta, GA' AND Membership level is 'EKAM USA Adult Volunteer'	Pravallika CH 12/15/2021 Delete search
EKAM Atlanta EYA's Run Default layout	Select a Chapter is 'Ekam Atlanta, GA' AND Membership level is 'EKAM Youth Ambassadors'	Pravallika CH 12/15/2021 Delete search
EKAM Austin EYA's	Select a Chapter is 'Ekam Austin, TX'	Pravallika CH 02/14/2021

4. Now all the selected chapter Adult Volunteers will be listed
5. You can click on each Volunteer to see the details, and also click on export to generate excel report for those members

Dashboard Contacts **Members** Events Store Donations Finances Email Settings Website Account Help center

Add member **Export** Email members

Overview EKAM Atlanta Adult Volunteer

Account layout

Organization ne

Referrals

Getting started of the following criteria

Select a Chapter is Ekam Atlanta, GA

Membership level is

Chapter Directors

Contact Us

EKAM Admin

EKAM USA Adult Volunteer

EKAM Youth Ambassadors

Sponsors

Search Save search as: Save

Records found: 5

Member Name	Membership Level	Member status	Email	Last login
User ID	Role	Status	Member emailing	
Organization		Renewal due on		
Administration				

Steps to Chapter Donation Reports

1. Login as admin
2. Goto Dashboard > Donations
3. Records can be filtered using available filter option
4. Filter by chapters:

By donation field select dropdown with option **Chapter**

Select specific chapter in **Item** dropdown

Export List using Export button

Personify
Donations Donors Donation receipt Confirmation email Settings

Record donation Export Export to QuickBooks Donations report

Donation list

Donations Recurring donation subscriptions

0 of 63 records, relevant for since 10/16/2021 to 12/15/2021 with All status and Chapter: New Orleans donation field.

Time period: Last 60 days | Status: All | By donation field: Chapter | Item: New Orleans

Search by status, tender, type, donor name, etc.

None of the 63 possible items are shown. Please adjust the filter.

5. Filter by Campaign

By donation field select dropdown with option **Donation Campaign**

Select specific campaign in **Item** dropdown

Export List using Export button

Personify
Donations Donors Donation receipt Confirmation email Settings

Record donation Export Export to QuickBooks Donations report

Donation list

1-3 of 63 records, relevant for since 10/16/2021 to 12/15/2021 with All status and Donation Campaign: Feed The Hungry donation field.

Time period: Last 60 days | Status: All | By donation field: Donation Campaign | Item: Feed The Hungry

Search by status, tender, type, donor name, etc.

Date	Number	Donor	Type	Tender	Amount
11/01/2021	00036	Reddy, Neelima neelima_greddy@yahoo.com	One-time	PayPal Payments	\$255.00 (USD)
Entered contact field values: First Name: Neelima Last Name: Reddy Email: neelima_greddy@yahoo.com Phone: 2259530414					
11/01/2021	00035	Berrigan, Jane jberrigan@cox.net	One-time	PayPal Payments	\$102.00 (USD)