

## Reporting Xpress Reports

All reports for your parish can be viewed or downloaded in Excel or PDF format. They are updated daily, and older reports are also available if you want to examine the activity for a certain day. Click on the cloud to download a report, click on the Excel spreadsheet icon or eyeball icon for PDF to view the report without downloading, and click on the gear icon or arrow on the bottom right to display and select previously run reports.

The screenshot displays the Reporting Xpress interface. At the top, there are two report cards for '2025 - 403 - Constituent Detail'. The left card is for 'Detail - XLS' and the right card is for 'Detail - PDF'. Both cards show the report title '2025 - 403 - Saint Clare - Constituent Detail' and the date '03/12/2025'. The XLS card has a download icon, an Excel icon, and a gear icon. The PDF card has a download icon, an eyeball icon, and a gear icon. Below the report cards is a search bar with the text 'Search history by name'. Below the search bar are 'From:' and 'To:' fields with calendar icons. Below these fields is a list of 16 items, showing the first five: '03/12/2025 01:13 AM ParishConstituentDetailReportRuntime.pdf', '03/11/2025 01:14 AM ParishConstituentDetailReportRuntime.pdf', '03/10/2025 01:07 AM ParishConstituentDetailReportRuntime.pdf', '03/07/2025 01:24 AM ParishConstituentDetailReportRuntime.pdf', and '03/06/2025 01:16 AM ParishConstituentDetailReportRuntime.pdf'. Each item has a trash icon, an eyeball icon, and a download icon. At the bottom left is an 'Include Archive' checkbox, and at the bottom right is a 'Cancel' button.

### **Constituent Detail Report**

This report lists all donor gifts and pledges to date. Data includes donor name, salutation, mailing address, email, pledge amount, pledge payments, one-time gifts, recurring payments, and most recent payment date.

### **Constituent Summary Report**

This report provides a daily summary (snapshot) of your 2025 Annual Appeal campaign status. Information on the report includes 2025 parish goal, total pledges made, amount collected towards those pledges, the outstanding pledge balance, total of one-time gifts and recurring payments, total gifts received (includes pledge payments, one-time gifts, and recurring payments), dollar amount over or under goal (this amount DOES NOT include outstanding pledges or projected annual amount from a recurring gift), number of donors, and number of gifts.

### **Outstanding Pledge Report**

This report lists all donors who have made a pledge and the balance owed on that pledge. Donor contact information, including mailing addresses, emails, and phone numbers, is provided so that you can contact them as needed.