

As part of our commitment to continuously updating and enhancing our fundraising system, we are thrilled to announce our latest enhancements.

What's new in the system?

Beautifully redesigned Reports Tab

New fields for Donation Details report

New fields for Registration Details report

"Pick & Choose" Reporting Options

Integration with GiftWorks CRM

A beautifully redesigned Reports Tab

We've upgraded the Reports tab to make it easier for administrators to move between standard reports, custom reports, and the new "saved version" of a customized report! All our reports can now be found on a single screen. When a user hovers over the name of a report, a description will appear.

The screenshot shows the 'Reports' tab in the Artez system. The interface includes a navigation bar with tabs for Home, Configuration, Events, Relationships, Data Entry, Reports, Export Data, Import Data, and Dashboard. The 'Reports' tab is active, and the page title is '[Reports]'. Below the navigation bar, there is a 'Reports' section with a sub-header 'Reports' and a description: 'The reports listed below are all of the reports available currently through your Artez account. Hover over a report name to view a description of that report.'

The reports are organized into three main sections:

- Standard Reports:** A list of 12 reports including Billing, Fundraising, Monthly Donations, Purchase Item (Excel version), Registration, Tribute, Donation, Gift Aid, PayPal Reconciliation, Purchase Item (PDF version), Snapshot, and Voided Tax Receipt. There is also a link for eTicket (Excel version).
- My Customized Reports:** A list of 3 reports: my donation report, Test Customization, my registration, Test Customization, and New Custom.
- Organization Custom Reports:** A list of 15 reports including CMN Zip Code Report - Solicitor, CR Daily Status, CR Sponsorship Page Moderation, Custom - EFT Detail, Custom - Payment Gateway Reconciliation Detail, Custom Registration Report, CMN Zip Code Report - Team Captain, CR Fundraising Summary, Custom - Consolidated Management, Custom - Location Registration Details, Custom - Payment Gateway Reconciliation Summary, Paypal, CR Corporate Affiliate, CR Miler Activity, Custom - Credit Card Summary, Custom - Location Registration Details Team, Custom - Unicef Report, Custom KFC Tribute Report, and TEST - Custom - Payment Gateway Reconciliation Summary.

Callout boxes provide additional context:

- Left Callout:** "All standard reports are grouped together and listed alphabetically."
- Bottom-Left Callout:** "'My Customized Reports' contains saved versions of the Registration and Donation Details reports."
- Right Callout:** "Custom Reports created for clients by the Artez Professional Services team have their own section."

New fields added to the Donation Details report

We have added a number of new fields to the Donation Details report that previously were unavailable or only found in the Snapshot report. The most important addition to this report is the inclusion of UDFs (User Defined Fields). UDFs are the questions asked in the “Survey Questions” area on a donation or registration form.

New Field	Description
Constituent ID	System-generated unique number assigned to the donor.
Event ID	System-generated unique number assigned to the event.
Transaction ID	System-generated unique number for the transaction (credit card/PayPal) associated to the donation.
Title	Indicates the title chosen by the donor at time of donation. (ie. Mr, Ms.)
Mobile Donation	Indicates if donor gave through a mobile donation page. (Yes or No)
Solicited Donation	Indicates if the donation was solicited (Meaning: The donor gave to a registrant on the system). “Team” would appear if it was a direct team donation, “Individual” for donations to a participant, and “Self Sponsor” for self-sponsored donations. If the donation is not solicited, the field would be blank.
Solicitor ID	Indicates the solicitor’s (Registrant’s) Constituent ID. Will only be populated on the record for a solicited donation.
Donor Name Scroll Permission	Indicates if the donor has given permission for their name to appear on the registrant’s personal page activity list. “Y” or “N” would be populated based on the donor’s response to the question.
Donor Donation Scroll Permission	Indicates if the donor has given permission for their donation amount to appear on the registrant’s personal page activity list. “Y” or “N” would be populated based on the donor’s response to the question.
Transaction Status	Indicates the payment status as displayed on the donor record inside the system on the Relationships tab. Possible values are: Failed, Pending, Succeeded, Voided.
Processing Date and Time	Payment gateway processing date & time. YYYY-MM-DD HH:MM:SS.
Payment Date and Time	Artez processing date & time. YYYY-MM-DD HH:MM:SS.
Payment Method	Indicates the payment method used to make the donation. Possible values are: Cash, Credit Card, PayPal.
Credit Card Transaction ID	Transaction number that is passed back from the payment gateway.
Authorization Number	Authorization number that is passed back from the payment gateway.
Batch ID	If the donor was created through data entry, this column would be populated with the associated Batch ID. If the transaction source is not Data Entry, the field will be blank.
User Defined Fields	The Donation Details report will only display the UDFs that have been made visible on a donation page and were answered by a donor.

New fields added to the Registration Details report

We have added a number of new fields to the Registration Details report that previously were unavailable or only found in the Snapshot report. The most important addition to this report is the inclusion of UDFs (User Defined Fields). UDFs are the questions asked in the “Survey Questions” area on a donation or registration form.

New Field	Description
Constituent ID	System-generated unique number assigned to the registrant.
Event ID	System-generated unique number assigned to the event.
Transaction ID	System-generated unique number for a transaction associated to the registration.
Title	Title chosen by the participant at the time of registration. (ie. Mr, Ms.)
Emergency Contact 1 Extension	The extension number entered in the emergency contact 1 extension field during registration. If a value was not entered during registration, the field will be blank.
Emergency Contact 2 Extension	The extension number entered in the emergency contact 2 extension field during registration. If a value was not entered during registration, the field will be blank.
Registered By	If a registrant was registered by another user, this field will populate with the Constituent ID of the participant that registered this individual. If a registrant was not registered by another person, the field will be blank.
Registered By – First Name	If a registrant was registered by another user, this field will populate with the First Name of the participant that registered this individual. If a registrant was not registered by another person, the field will be blank.
Registered By – Last Name	If a registrant was registered by another user, this field will populate with the Last Name of the participant that registered this individual. If a registrant was not registered by another person, the field will be blank.
Location Type	If the user registered under a location associated to a location type, the name of the location type will appear in this field.
Mobile App	Indicates if a registrant logged into a mobile fundraising app and which type of device they used. Values include: “Android”, “iOS”, or (if the registrant had logged into both device types) “Android, iOS”. If a registrant has not logged into the mobile app, the field will be blank.
Scoreboard Permission Individual	A “Y” or “No” indicates if the registrant has given permission for their name to appear on the event scoreboard.
Personal Page Message	Indicates if the default personal page message has been changed by the user. A value of “Default” appears if the personal message was not edited. “Modified” appears if the personal message has been updated.
Participant Number	Indicates the participant number assigned to the user if waves have been enabled for the registrant’s location. If registrant did not register in a wave, the field will be blank.
Wave Name	Indicates the name of the registrant’s location wave. If registrant did not register in a wave, the field will be blank.
Start / Wave Time	Indicates the registrant’s wave start time. If registrant did not register in a wave, the field will be blank.
Transaction Status	Indicates the registration fee transaction status as displayed on the user’s record inside the system on the Relationships tab. Possible values are:

	Failed, Pending, Succeeded, Voided. If a registration fee was not paid, the field will be blank.
Processing Date and Time	Payment gateway processing date and time. Format YYYY-MM-DD HH:MM:SS. If a payment was not associated to this registration, the field will be blank.
Payment Date and Time	Artez processing date and time. Format YYYY-MM-DD HH:MM:SS. If a payment was not associated to this registration, the field will be blank.
Paid by – First Name	First Name of the person who paid the registration fee.
Paid By – Last Name	Last Name of the person who paid the registration fee.
Payment Status	Indicates the registration fee payment status as displayed on the user record in the Relationships tab. Possible values are Not Applicable, Paid Status, Pending Status, Waived. If a fee does not apply to this registration, the field will be blank.
Batch ID	If the registration was created through data entry, this column would be populated with the associated Batch ID. If the registration source is not Data Entry, the field will be blank.
Language Preference	Indicates the registrant's language preference. Possible values are English or French.
Email Contact Permission	Indicates the registrant's response to the Email Contact Permission question. Values are: Yes or No.
Post Contact Permission	Indicates the registrant's response to the Post Contact Permission question (Mail). Values are: Yes or No.
User Defined Fields	The Registration Details report will only display UDFs that have been made visible on a registration page and were answered by a participant.

“Pick and choose” reporting with new customization and saving options!

With the addition of new fields to the Donation and Registration Details reports, we have also added the ability for administrators to choose which fields are displayed when generating those reports. Artez administrators may also save a customized version of the Registration Details or Donations Details reports for future use. **Please note:** This functionality is currently only available for the Donation Details and Registration Details reports.

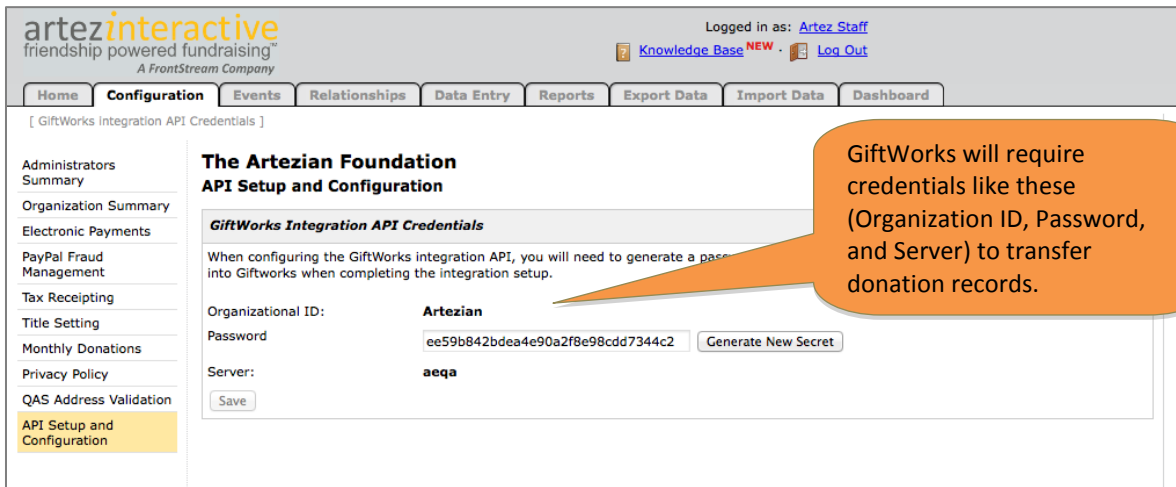
The screenshot shows the 'Report Criteria: Donation' configuration page. At the top, there are navigation tabs: Home, Configuration, Events, Relationships, Data Entry, Reports, Export Data, Import Data, and Dashboard. The 'Reports' tab is active, showing a breadcrumb 'Reports » [Report Criteria]'. On the left, a sidebar has 'Report Criteria' selected. The main content area is titled 'Report Criteria: Donation' and includes a sub-header: 'Donation Reports are available in two formats: 1. DETAILS: Includes details for each Donor. 2. SUMMARY: Includes totals for all Donors.' Below this is the 'Basic Report Settings' section, which contains 'Report Information' with a dropdown for 'Select Event' (set to 'Mark's 12b test Event') and radio buttons for 'Report Format' (selected: 'Details - File', unselected: 'Summary - File'). There are also dropdowns for 'Locations' (set to 'First Location') and date pickers for 'Transaction Start Date' (Jan 14, 2010) and 'Transaction End Date' (Jan 14, 2014). The 'Report Customization' section follows, with 'Report Columns' divided into 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes: Company Name, Department, Job Title, AddressLine3, AddressLine4, Preferred Language, Batch ID, Donation Origin, and UDF-age. The 'Selected Columns' list includes: Title, Donor Last Name, Donor First Name, AddressLine1, AddressLine2, City, Province/State, Home Phone Number, Cell Phone Number, Postal Code/ZIP, and Country. A 'Reset' button is located at the bottom right of the 'Report Customization' section. At the bottom of the page are buttons for '< Back' and 'Generate Report'. Four callout boxes provide instructions: 1. 'Administrators must choose the “Details - file” version of a Registration or Donation report.' (pointing to the 'Details - File' radio button). 2. 'Simply drag and drop fields from the available column list to the selected columns list for inclusion in the report.' (pointing to the 'Available Columns' list). 3. 'Order the fields in the selected column list by dragging and dropping the field.' (pointing to the 'Selected Columns' list). 4. 'Save the customized version of the report for use at a later time by providing a name and description of the report.' (pointing to the 'Save Customization' button).

Integration with GiftWorks CRM

Artez is now integrated with GiftWorks, a Customer Relationship Management (CRM) database designed for charities and nonprofit organizations! Artez and GiftWorks clients can transfer donations made through the Artez system into their GiftWorks database.

How to transfer donation records from Artez to GiftWorks:

Artez administrators must first access the “API Setup and Configuration” section of the Configuration tab and note their unique Organization ID, Password and Server information.



Inside GiftWorks, access “Other Settings” > “Tools, Updates and Integration” > “Artez Interactive Settings”.



What data is transferred from Artez to GiftWorks?

Basic donation and addressing information is available for transfer from Artez into the associated fields in the GiftWorks database. Administrators can choose, review, edit and/or assign a fund to donor records before import.

The following fields can be imported into GiftWorks:

- DonorTitle
- DonorFirstName
- DonorLastName
- DonorOrganization
- DonorAddress1
- DonorAddress2
- DonorAddress3
- DonorAddress4
- DonorApartment
- DonorCity
- DonorState
- DonorCountry
- DonorPostalCode
- DonorEmail
- DonorPhone
- DonationDate
- Amount
- PaymentMethod

When is data transferred from Artez to GiftWorks?

Administrators must decide when they want to transfer Artez records into GiftWorks. The GiftWorks user interface allows administrators to manually decide which records to import and when the import should occur. GiftWorks includes tools to help users match a new Artez donor record with an existing GiftWorks donor record.

How are monthly donation records represented inside GiftWorks?

A new donation record will be created for each monthly (reoccurring) gift.

Can registrant or team records be transferred into GiftWorks?

At this time, only donation information can be moved into GiftWorks through the Artez integration.

How can I learn more about the GiftWorks CRM?

If you are interested in learning how the GiftWorks CRM can benefit your organization, you can visit the website www.giftworksconnect.com, call the GiftWorks sales team at 888-323-8766 x 2 or tweet [@giftworks](https://twitter.com/giftworks)!

This document was prepared as a "preview version" for clients. Some features may be subject to final changes. For the most updated information about features in this release, visit the Artez Knowledge Base and view materials under "Latest Release" or search by keyword.
<http://support.artez.com>