Your reports tab allows you to view stats and transaction details and export reports from all of your campaigns. Watch the video below for a quick overview!

To view responses to a custom field on a campaign, you'll need to generate a custom report.

Before you get started, you'll need to know **how the custom field(s) you're reporting on is configured within your campaign:**

With the launch of Universal Checkout, your supporters can now add a variety of engagements to a single transaction. As a result, there are now two ways to add custom fields to a campaign. You can:

1. Add custom fields to an entire order (within **Order Settings** > **Custom Fields Applied to Entire Order**), or

2. Add custom fields *only* to individual items (within **Tool Settings** > **Advanced Settings**).

When you apply custom fields to an entire order, everyone who completes a transaction within the campaign will have to answer that question—regardless of how they interact with your campaign! Of course, there are scenarios where this wouldn't make sense. For instance, you might create a multi-tool campaign that includes the option to make a donation or register for your event. For event attendees, you'll want to know about any dietary restrictions, so you'll include a custom field to gather that information *only* for those who add registration to their cart. This way, you don't end up asking folks who only want to make a donation about their meal preferences.

*Note: With the release of Universal Checkout, you'll now find Custom Fields for your existing campaigns within Tool Settings > Advanced Settings for the particular engagement tool they are associated with.*

Once you know how your custom fields are being applied, you're ready to create and customize your report. **Below are step-by-step instructions for reporting on custom fields:**

Help Center

ed to an entire order

ed to individual items within an order

- Custom Fields Advanced Settings (Activity Level reporting ONLY)

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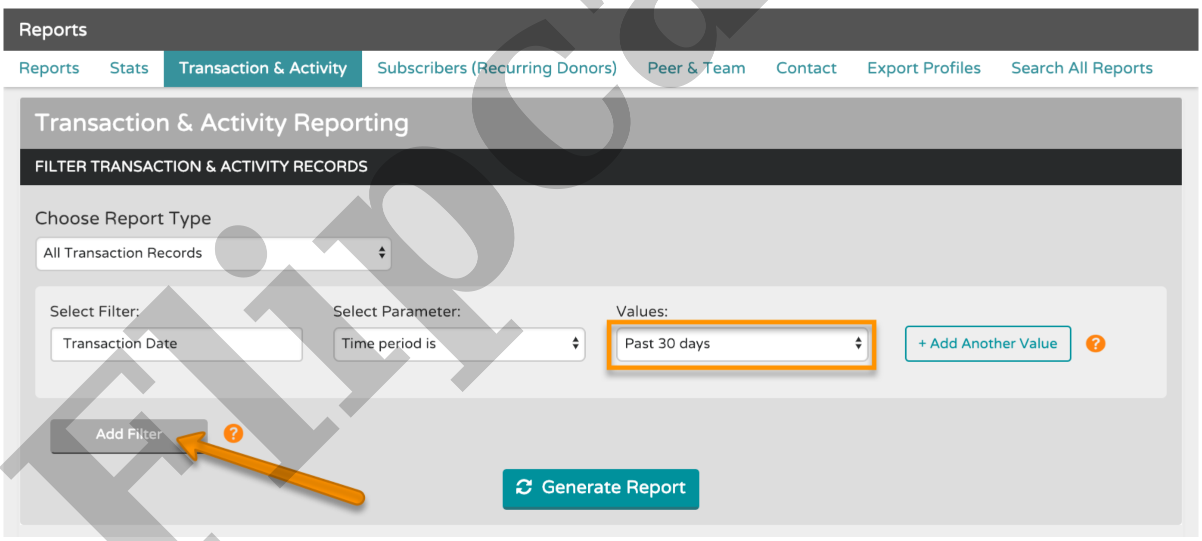
## Reporting on Custom Fields Applied to an Entire Order

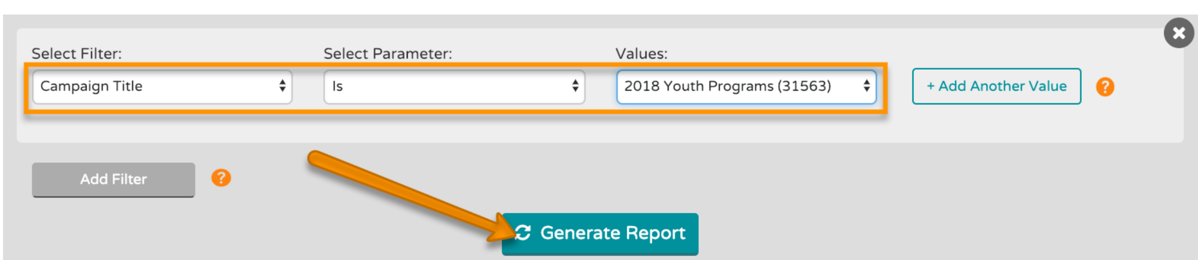
Remember, these are the questions set up in Order Settings. These are questions that everyone who interacts with your campaign will fill out, and they're not associated with any particular tool type.

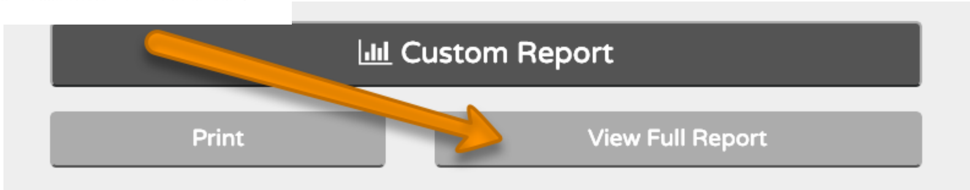
<u>To pull a report:</u>

- From your Dashboard, navigate to the **Reports** > **Transaction & Activity Reporting**.
- Leave Choose Report Type set to "**All Transaction Records"**.
- Next, select a date range that contains the transactions you want to include in your report.
- Once you've set your date range, click **Add Filter**.




- Now you'll want to filter for the specific campaign containing the custom fields you want to report on. Select Filter = "Campaign Title", Parameter = "Is", and then select your campaign from the dropdown list. Then hit **Generate Report**.

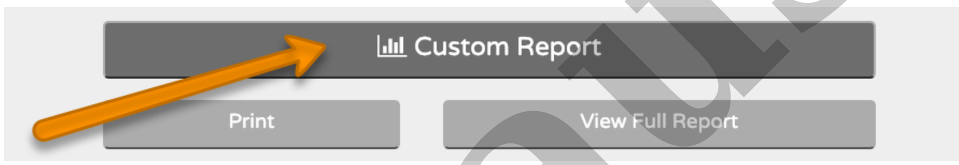




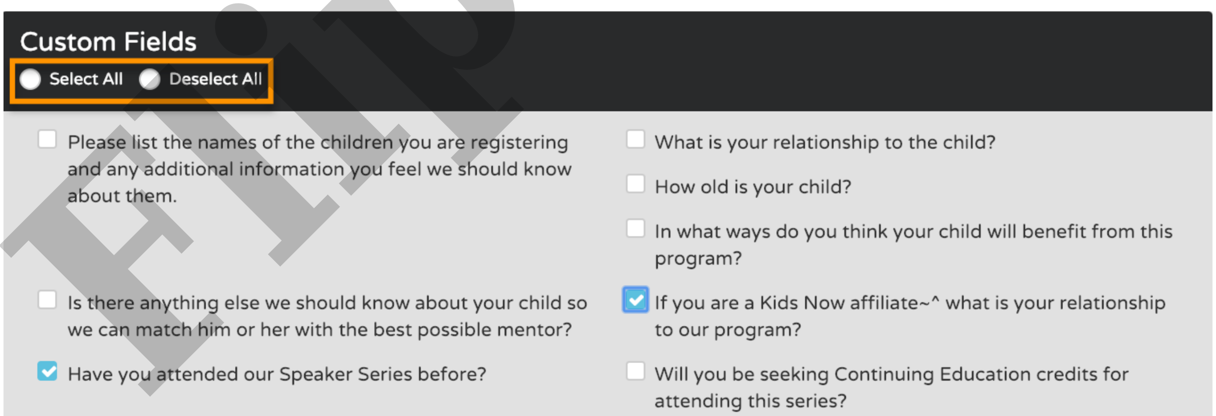

- This will open a window where you can choose to view the report in your browser, have it sent to your email address as a .csv file, or both. Once you've made your selection, click **Get Report**.

<u>**You can also create a Custom Report to view only Custom Field data:**</u>

- Instead of View Full Report, you'll scroll down and click on the **Custom Report** button:

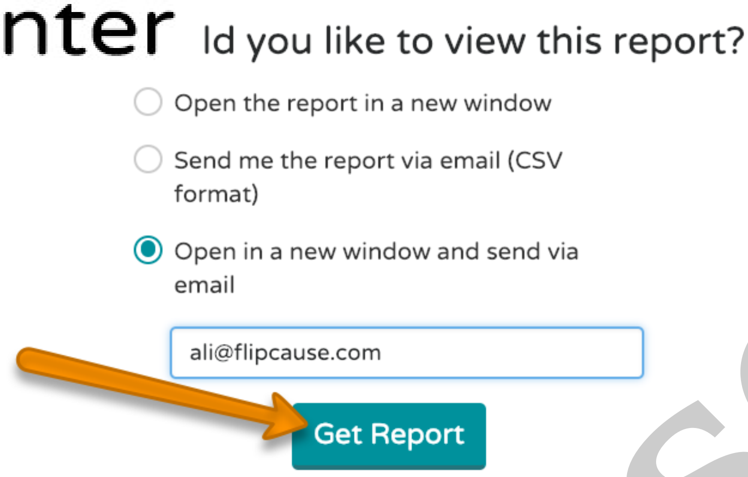



- This will open an overlay where you can select only the fields you want to include in your report. To choose which custom fields to include in your report, scroll to the final section and Select all, Deselect all, or choose individual custom fields:




*Note: All custom fields in your account will appear in this section, however, ONLY custom fields added to this specific campaign will have data available in this report.*

- Finally, choose whether you'd like to open the report in a new window, receive a .csv format report via email, or both. Then click **Get Report**:

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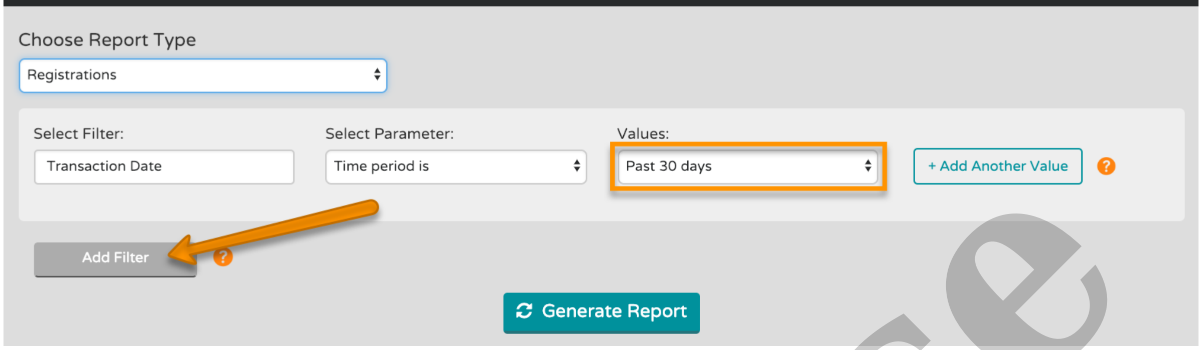
## Reporting on Custom Fields Applied to Individual Items Within an Order

These are custom fields linked to a specific tool type, and only supporters who add that specific engagement will be asked to answer these questions. This second setup includes custom questions created on campaigns before January 15, 2019.

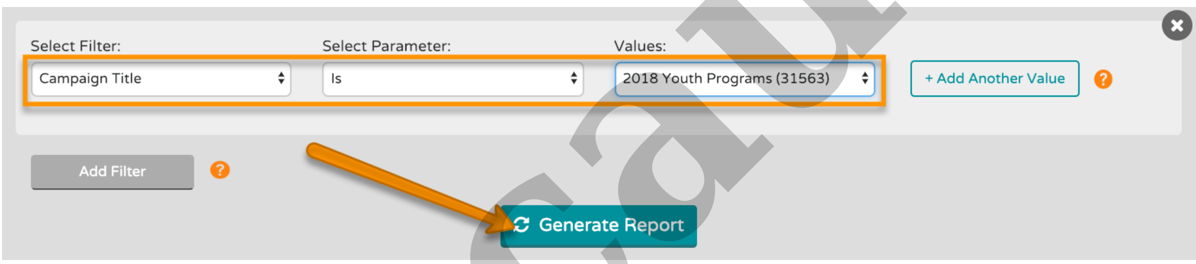
<u>To pull a report:</u>

- From your Dashboard, navigate to the **Reports** > **Transaction & Activity Reporting**.
- Now, you'll need to Choose a Report Type for the specific engagement tool and its corresponding custom fields. For example, if you have custom fields setup on your Registration Groups, you'll select Registrations from the dropdown list:

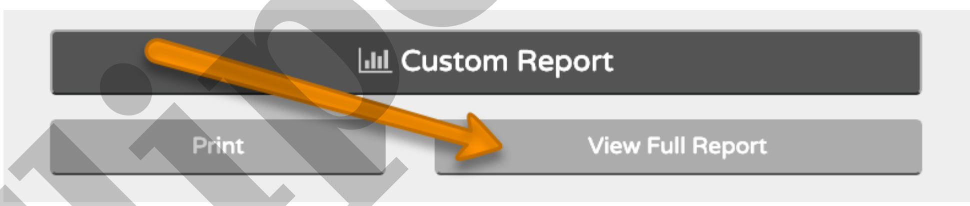

- Next, select a date range that contains the transactions you want to include in your report.
- Once you've set your date range, click **Add Filter**:




- Now you'll want to filter for the specific campaign containing the custom fields you want to report on. Select Filter = "Campaign Title", Parameter = "Is", and then select your campaign from the dropdown list. Then hit **Generate Report**:



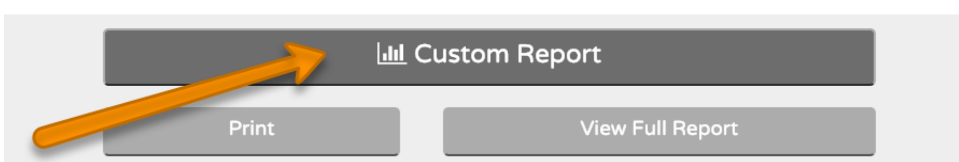

- From here, scroll down and click **View Full Report**.



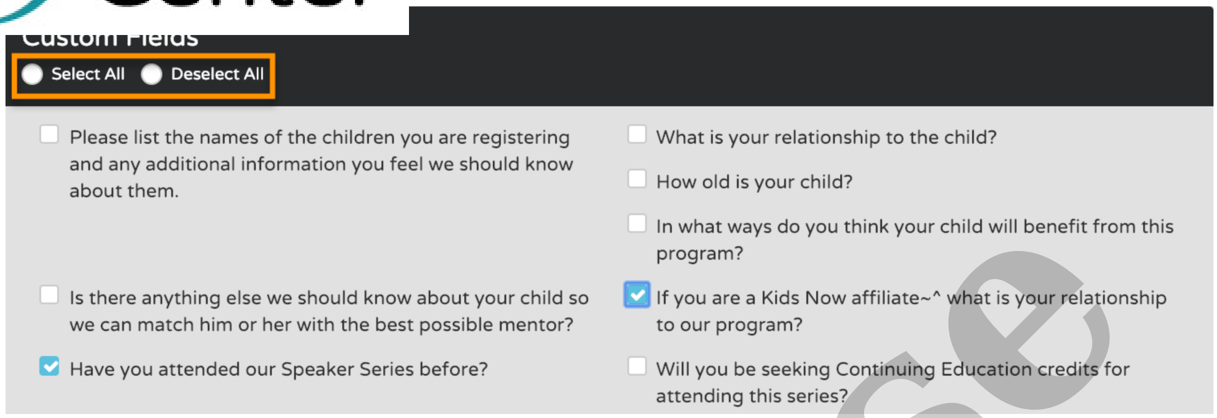

- This will open a window where you can choose to view the report in your browser, have it sent to your email address as a .csv file, or both. Once you've made your selection, click **Get Report**.

<u>**You can also create a Custom Report to view only Custom Field data:**</u>

- Instead of View Full Report, you'll scroll down and click on the **Custom Report** button:

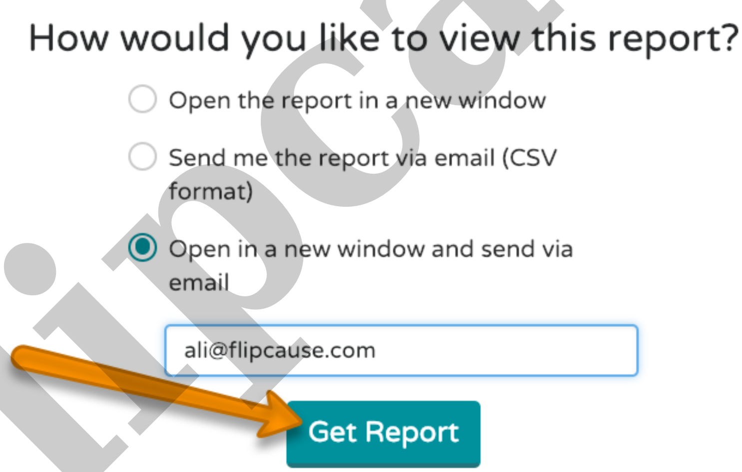



- This will open an overlay where you can select only the fields you want to include in your report. To choose which custom fields to include in your report, scroll to the final section and Select all, Deselect ds:




*Note: All custom fields in your account will appear in this section, however, ONLY custom fields added to this specific campaign will have data available in this report.*

- Finally, choose whether you'd like to open the report in a new window, receive a .csv format report via email, or both. Then click **Get Report**:



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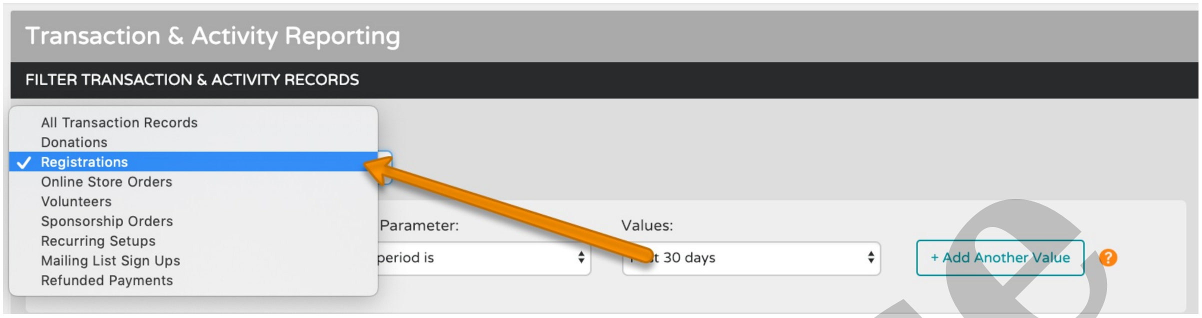
## Custom Field Advanced Settings

When pulling a report on custom fields applied at the individual item level, you will have the option to also pull custom fields from the order level using advanced settings.

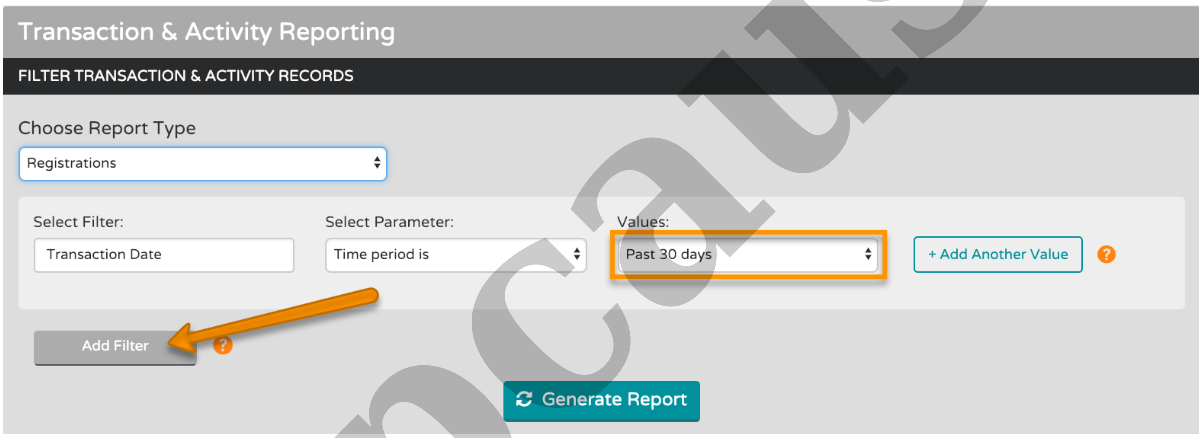
To view Custom Field Advanced Settings:

- Go to **Reports** > **Transaction & Activity Reporting**.
- "Choose a Report Type" must be set to Donations, Registration, Online Store Orders, Volunteers, OR

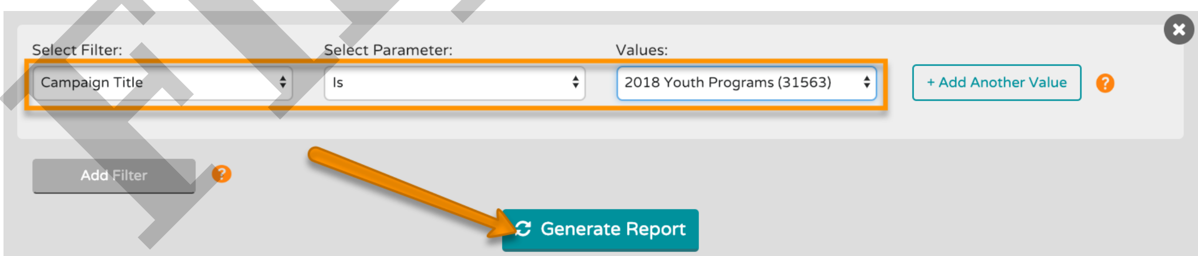
*Advanced Settings is currently not available for All Transaction*



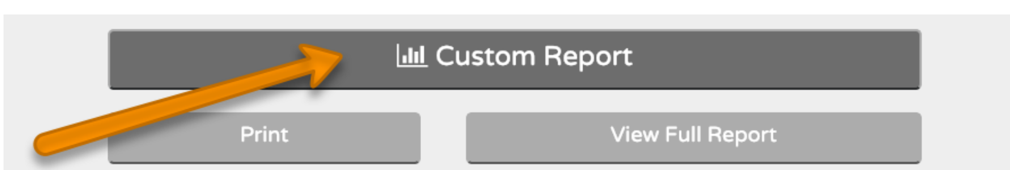

- Next, select a date range that contains the transactions you want to include in your report.
- Once you've set your date range, click **Add Filter**:




- Now you'll want to filter for the specific campaign containing the custom fields you want to report on. Select Filter = "Campaign Title", Parameter = "Is", and then select your campaign from the dropdown list. Then hit **Generate Report**:

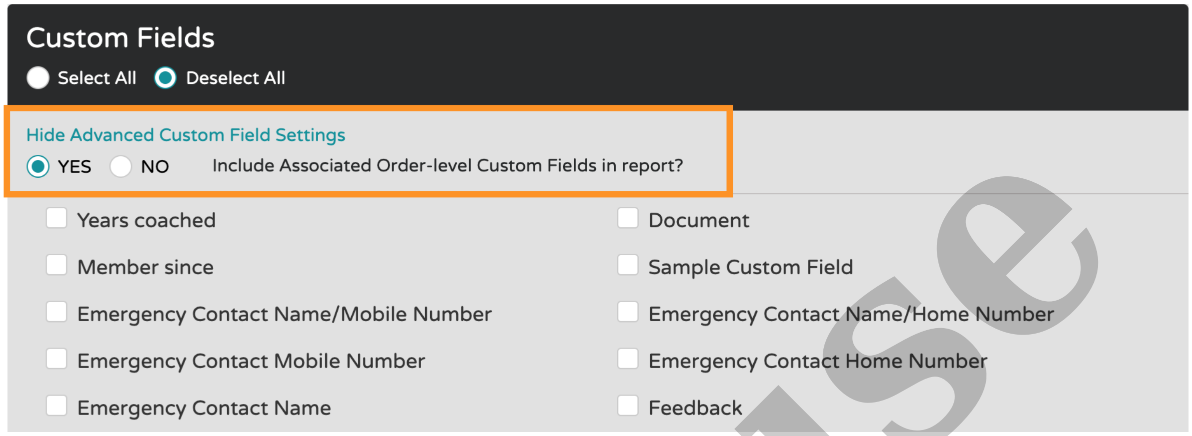



- Scroll down and click on the **Custom Report** button:

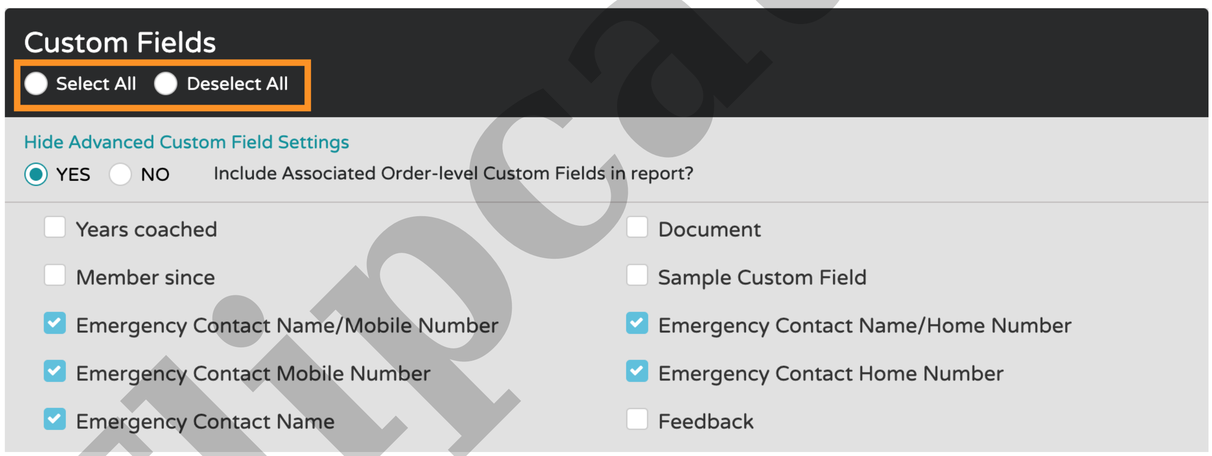



- This will open an overlay where you can select only the fields you want to include in your report.

rder level in your report, scroll to the Custom Fields section and click
tings" then click "Yes".




- Click Select All or click on the individual custom fields you want to include in your report:




*Note: All custom fields in your account will appear in this section, however, ONLY custom fields added to this specific campaign will have data available in this report.*

- Finally, choose whether you'd like to open the report in a new window, receive a .csv format report via email, or both. Then click **Get Report**:

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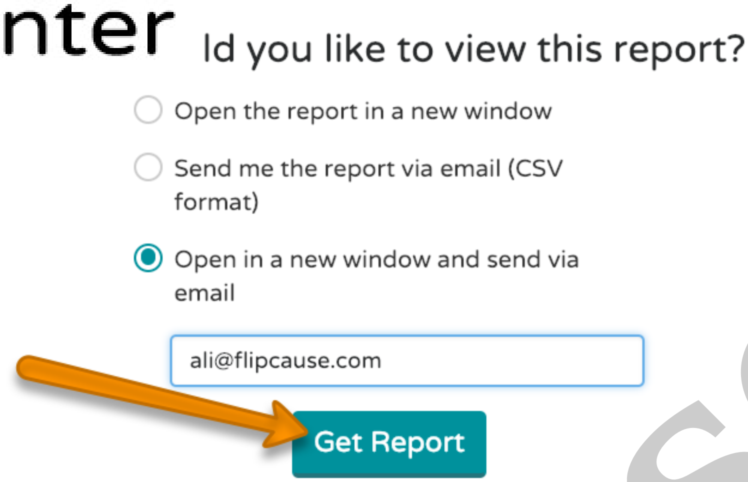


- Custom Field responses from the Order Level will appear under the column with **OL** in front of the custom field title. Custom Fields set up at the item level will appear under the column with an **AL** in front of the custom field title.

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