

Standard Report Descriptions

Ebase Pro

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Purpose

This document provides a description of reports provided as a standard in ebase Pro V2.11. The information provided here was exported from a version of ebase Pro downloaded from the ebase web site on September 14, 2004.

Report Descriptions

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
Contact	Contact History	Items	Lists basic contact information, then history of select items within a date range.	Lists basic contact information, then history of select items within a date range.		List/Summary	ebase	
Contact	Contact Link report	Items, Contacts & Links	Report which provides contact details for the people linked to one or more contacts.			List/Summary	ebase	
Contact	Contacts listed by Item	Items and contacts	This report format shows item titles and descriptions, and people who have that item in their record.	This report format shows item titles and descriptions, and people who have that item in their record.	_ccCodetitle, _ccCodeDescription, ContactName, ContactShortInfoLine	List/Summary	ebase	Geoffrey Smith
Contact	Contacts, custom export	Contacts	Exports user selected Contact data fields in .mer format	Prompts user to select fields to export and then name file.	All fields in ContactReports	Export		
Financial	Basic Payment, export	Items	This report exports data related to a donation.	This report can be used to create mail-merge letters, receipts, and custom reports in spreadsheets and word-processing documents. It contains basic contact information, plus: Greeting Last Gift Gift Date Solicitation (that gift responded to) Solicitor	Name Address (Street, City, State, Zip, Country) Greeting Last Gift Gift Date Solicitation (that gift responded to) Solicitor Payment For Membership Expiration Date ID#	Merge file	any application that can process .mer files	Elizabeth Stampe

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
Financial	Deposit report	Items	Find in LR- List of payments received, totals. Choose summay or detail. Print only.	Pa		List	ebase	
Financial	Solicitation Deposit Report	Items	Deposit sorted on Solicitation and including Unique code Find in LR- List of payments received, totals. Choose summay or detail. Print only.	Deposit sorted on Solicitation and including Unique code Find in LR- List of payments received, totals. Choose summay or detail. Print only.		List	ebase	Clif Graves
Fundraising	Complete Donor History	Contacts	Complete donor history, one page per donor. Uses Contact data to produce results.	Name Address All gifts ever given Gift Dates Solicitations (that gifts responded to) Solicitor Payment For Member Status Membership Expiration Date Ž Links Ž Email and phone Ž preferred contact method Ž source Ž total lifetime gifts given, average gift, l		List/Summary	ebase	
Fundraising	Donor & Solicitor report	Items	Lists donor name, solicitor name and donation amount. Totals donations for campaign. Print only.	Report lists: Name Address (Street, City, State, Zip, Country) For each record found, displays: Code Title Solicitation Title Solicitor Donations within range specified DatePosted Payment For	ContactName PCLShortInfo For each record found, displays: _ccCode Title SolicitationTitle Solicitor ItemAmount DatePosted Member Type	List/Summary	ebase	Elizabeth Stampe
Fundraising	LYBUNT List	Contacts	List of donors who gave Last Year but Unfortunately Not This year	<tbd>	ContactName PCLContactAddressFull PCLPhone PCLEmail ContactBy LastPostedPayment\$ LastPaymentDate	List/Summary	ebase	Matthew Scholtz

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
Fundraising	Member Giving – YTD		Report of member giving in the past year.	Report lists summary of giving and includes: expire date name YTD Dues\$ -1YTD Dues\$ Life Dues\$ YTD TOT\$ -1YTD TOT\$ LIFE TOT\$ address, city, state, zip, phone(s)				Chris Wagner
Fundraising	Pledge Report	Items	List of pledges (open, closed, etc.). Print only.			List	ebase	
Fundraising	Response Analysis	Items	List or summary of gifts received toward appeal(s). Choose summary or detail. Print only.			List/Summary	ebase	
Fundraising	SYBUNT List	Contacts	List of donors who gave a gift in the past, but not during the date range specified.	<td>		List	ebase	Matthew Scholtz
Fundraising	Soft Credit Report	Items	Reports donations made in the name of someone else. Lists donor, "soft" creditor, amount, and total.	Reports donations made in the name of someone else.	SoftCreditName SumAmount ContactName Amount DatePosted CodeTitle	List/Summary	ebase	ebase
Fundraising	Solicitor report	Items	Lists people who have solicited payments, provides subtotal and total amounts.	If any payments have been attributed to a solicitor, this report will display people who have solicited payments, provides subtotal and total amounts (provided they are found in your data set of course).	SolicitorName SumAmount ContactName Amount DatePosted CodeTitle	List/Summary	ebase	
Generic	Avery 5160 labels	Contacts	3-column mailing label using single, calculated field. Print only.	Member Expire Date ContactName AddressLine1 AddressLine2 City, State, Zip Country	CON::_ccContactInfoLabelStandard	Avery 5160 labels	ebase	
Generic	Avery 5160 labels ExpDate	Contacts	3-column mailing label using single, calculated field. Print only.	Member Expire Date ContactName AddressLine1 AddressLine2 City, State, Zip Country	Summery:: CON::_ccContactInfoLabelStandard	Avery 5160 labels	ebase	

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
Generic	Avery 5160 labels+email	Contacts	3-column mailing label using single, calculated field. Print only.	ContactName AddressLine1 AddressLine2 City, State, Zip Country Email	CON::_ccContactInfoLabelStandard CON::PCLEmail	Avery 5160 labels	ebase	
Generic	Basic Info	Contacts	Basic contact information on a single-line. Used as default list format.	Single line listing that displays ContactName, Org, AddressLine1, City, State, Zip, Country, Country, Email.	ContactName _ccLastPaymentCalc _ccContactInfoLine	Data on one line	ebase	
Generic	Basic Info+ 3-col	Contacts	Basic contact information displayed in a 3 column layout, plus contact metadata. Print only.	ContactName Primary Title Primary Org Primary Address Primary Email Primary Phone(s) Greeting Source Database Source ID# Contact Metadata	ContactName PCLTitle PCLOrg PCLAddress PCLEmail PCLPhone(s) Greeting Source Database Source _kContactID Contact Metadata	3-column print out	ebase	
Generic	Basic Info+, Export	Contacts	Basic contact information plus contact metadata. exported to a .mer file. Can be used by any application that can accept CSV formatted files.	Basic contact information plus contact metadata. exported to a .mer file. Can be used by any application that can accept CSV formatted files. Data exported includes: ContactName Primary Title Primary Org Primary Address Primary Email Primary Phone(s) Gre	ContactName PCLTitle PCLOrg PCLAddressLine1 PCLAddressLine2 PCLCity PCLStateProvince PCLCountry PCLCounty PCLEmail PCL_ccDisplayPhone PhoneMobile PhonePager Greeting Source _kContactID Contact Metadata	Merge file (.mer -- CSV w/headers)		
Generic	ContactsAll.csv	Contacts	Standard export fields for	Uses the existing Find in	Export Order:	Merge file (.mer --	-	ebase team

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
			merge / spread	Contacts to export the standard export fields for merge / excel from Contacts. Use where one line per Contact is needed	CongressDistrictUS(Text), ContactName(Text), ContactRecordType(Text), DateOfBirth(Date), GreetingPreferred(Text), GroupLableLine1(Text), GroupLableLine2(Text), HouseDistrictSTATE(Text), NameFirst(Text), NameLast(Text), NameMiddle(Te	CSV w/headers)		
Generic	ContactsAll.htm	Contacts	Standard export fields for merge / Word	Uses the existing Find in Contacts to export the standard export fields for merge / Word from Contacts. Use where one line per Contact is needed	Export Order: CongressDistrictUS(Text), ContactName(Text), ContactRecordType(Text), DateOfBirth(Date), GreetingPreferred(Text), GroupLableLine1(Text), GroupLableLine2(Text), HouseDistrictSTATE(Text), NameFirst(Text), NameLast(Text), NameMiddle(Te	Merge file		ebase team
Generic	Email list, export	Contacts	List of names, primary email addresses, exported as a .mer file (CSV delimited, w/ field header).	ContactName PrimaryEmail Note: You will need to select where to send the exported data.	ContactName PCLEmail	Exported data in merge format		
Generic	LogAll.csv	Items	Standard export fields for merge / spread	Uses the existing Find to export related log itmes. the standard export fields for merge / excel from Contacts. Use where one line per Contact is needed	Export Order: ConID::_ccNameSorter(Calculation), ConID::ContactName(Text), ConID::ContactRecordType(Text), ConID::NameFirst(Text), ConID::NameLast(Text), ConID::NameMiddle(Text), ConID::NameNickname(Text), ConID::NamePrefix(Text), ConID::NameSuffix	Merge file (.mer -- CSV w/headers)	-	ebase Team
Generic	LogAll.htm	Items	Standard export fields for merge / Word	Uses the existing Find to export related log itmes. the standard export fields for merge / Word from Contacts. Use where one line per Contact is needed	Export Order: ConID::_ccNameSorter(Calculation), ConID::ContactName(Text), ConID::ContactRecordType(Text), ConID::NameFirst(Text), ConID::NameLast(Text), ConID::NameMiddle(Text), ConID::NameNickname(Text), ConID::NamePrefix(Text), ConID::NameSuffix	Merge file (.mer -- CSV w/headers)	-	ebase Team
Generic	Phone Book	Contacts	Contact name, address, all phone numbers, in 2-column format. Print only.	Phone book information.	ContactName _ccContactInfo Phone number(s)	ebase	ebase	Walter Daniels

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
Generic	Phone List	Contacts	ContactName, Primary Phone, Primary Address on one line.	This report prints a single column list of people with their phone number prominently displayed. The list is sorted by contact name.	Phone locations ContactName Primary Phone Address information	One column, multi-line	ebase	
Generic	Single Contact Item History	Items	Listing of Items by category (Bucket1) For the CURRENT RECORD IN CONTACTS	Listing of Items by category (Bucket1) For use by ED or other staff to get overview of a Contacts relationship with the org. Views and prints the contact - Payment history for the single current Contact	PCL Address Label, PCL Phone, PCL Email, Bucket1, ccCodeTitle, Amount	List	ebase	Clif Graves
Generic	Zip Count	Contacts	Count of number of records with a particular zip code (used for bulk mailing)	Count of number of records with a particular zip code (used for bulk mailing)	ZIPCODE; _cnZipCount	List/Summary	ebase	Beth Hynes
Membership	Member renewal, export	Contacts	Export found Contacts for use in Mbr Renewal letters	Exports your current found set of Contacts. Includes member status, amount of last member payment, etc. for use in renewal letters.		Export		Matthew Scholtz
Membership	Member, export	Contacts	Export set of members based on status, etc.	First prompts you to select a group of members based on status, etc. Then exports contact info and membership status, etc.		Export		Matthew Scholtz
Membership	Members, Current	Contacts	Quick and dirty member list			List	ebase	
Special Use	Codes Report	Code Generator	Codegenerator Codes report	Codegenerator Codes report	All Codes related settings		ebase	ebase Team
Special Use	Email Bounce Report	Contacts	Report that creates an interactive list of contacts who's email is bouncing.	This report recalculates the number of email bounces accumulated by a contact, the asks the user to determine the number of bounces they want to search for (in many cases, bounce messages may be transient messages and it may be better policy to search for	Uses Contacts:List to report the contacts matching the number of bounces entered by the user.	ebase	ebase	Bob Schmitt
Special Use	Export for Enhanced Data- LCV	Contacts	Export data format for LCV and other	Export data format for use for LCV and other list enhancements	EXPORTDATE, SOURCEID, SOURCEID2, FIRSTNAME,	Merge file (.mer -- CSV w/headers)	Export	ebase team

ReportCategory	ReportName	ReportDataType	ReportDescriptionShort	ReportDescriptionLong	ReportFieldList	ReportFormat	ReportRunsIn	ReportAuthor
					MIDDLENAME, LASTNAME, SFXNAME, ADDRESS1, ADDRESS2, CITY, STATE, ZIPCODE, ZIP4, COUNTRY, AREACODE, PHONE, EMAIL, COUNTY, LOCATIONNAME, LOCATIONID, CONTACTLOCATIONID			
Special Use	Mail House Address export	Contacts	Export name and address fields as single line fields without returns or formatting for use in external mailing programs	Export name and address fields as single line fields without returns or formatting for use in external mailing programs. Fields specific to Org, Family or Individuals may be empty fields depending on record type.	_kContactID PCLContactNameOrgPrimaryContact PCL_IndividualNameLine PCLOrg PCLOrgDept GroupLableLine1 GroupLableLine2 PCLAddline1 PCLAddline2 PCLCity PCLState PCLZip PCLZip4 PCLCountry	Export	ebase	Clif
Under Construction	Contacts, Export mail merge data	Contacts	Exports contact info for use in mail-merge			Export		
Under Construction	Giving level report	Items	Report lets you define five giving levels, then breaks your found set into 5 segments to give you totals for each level.	Report lets you define five giving levels, then breaks your found set into 5 segments to give you totals for each level.		List/Summary	ebase	
Under Construction	Item Report	Items	Test of LogFind function			ebase	ebase	