

Report Studio eBook

Built-In AMS Analytics and Interactive Reporting Solutions

The logo graphic for MemberSuite, consisting of three parallel, light-colored zigzag lines.

MemberSuite

Make Better Data-Driven Decisions with User-Friendly Analytics and Interactive Reporting Solutions

MemberSuite's Report Studio offers robust and user-friendly reporting solutions to meet your unique needs, save staff time, and empower your organization to perform in-depth analysis of your centralized data.

Report Studio



Self-Service

Build your own charts, reports and dashboards from scratch



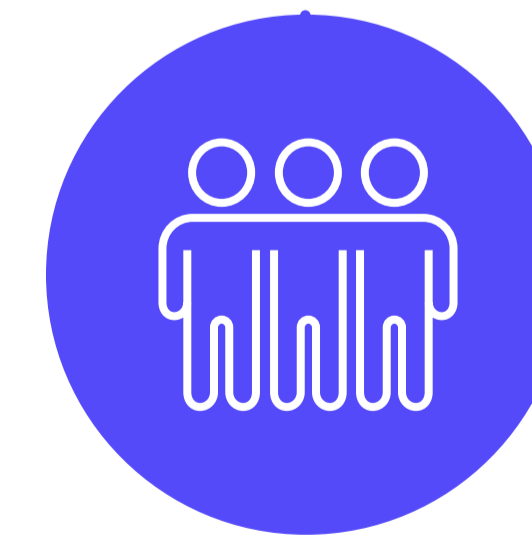
Interactive Reporting

Configure 60+ standard reports



Dashboards & Analytics

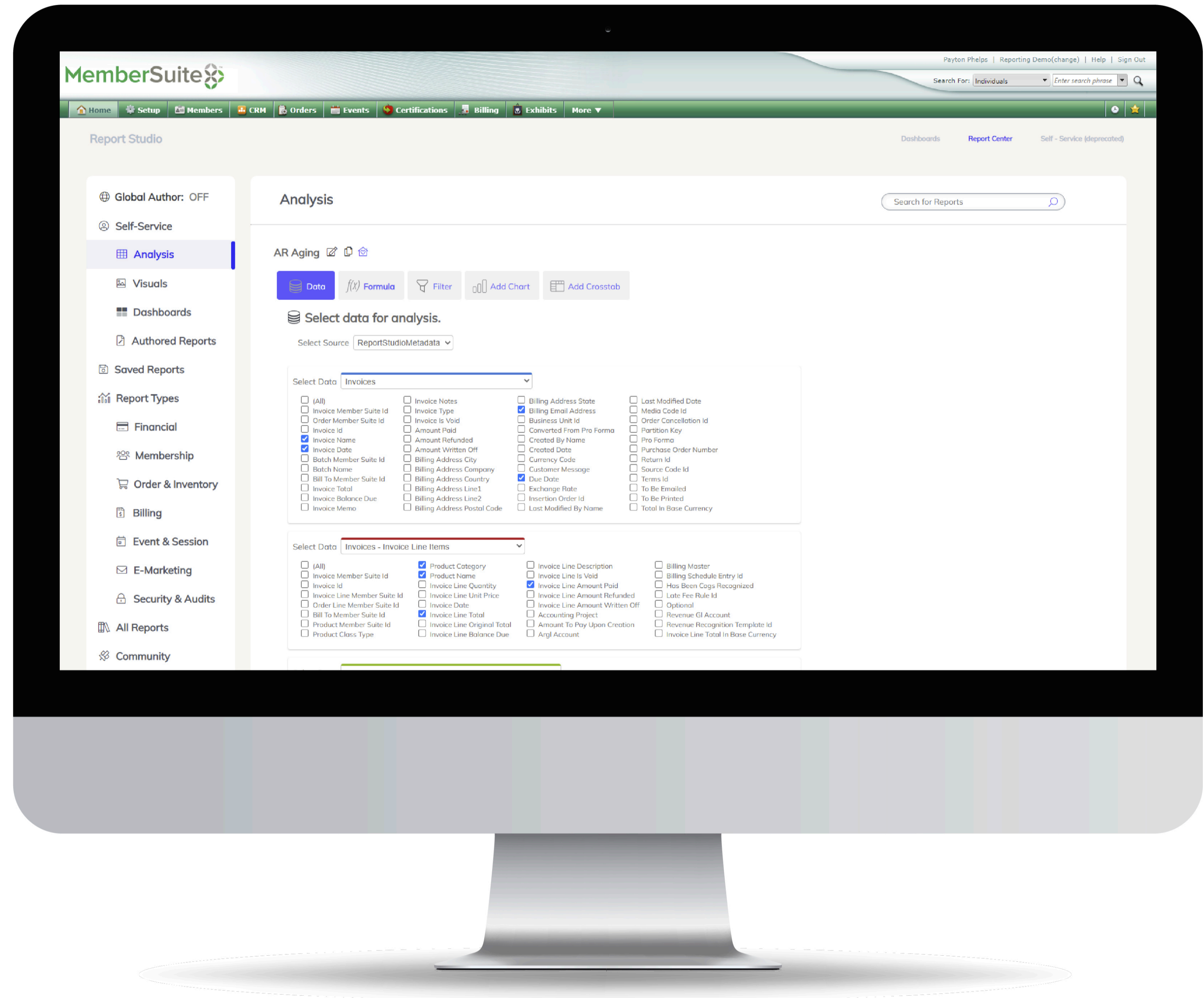
Leverage 5 pre-built dashboards



Community

Share and access report templates from our community of users.

Self-Service



Get Advanced, Self-Service Reporting & Data Analysis Capabilities

Report Studio's Self-Service reporting solution will empower you to build your own data visualizations, design reports, and create dashboards from scratch to perform in-depth analysis of your organization's data.

Data Access at Your Fingertips. Report Studio's Self-Service solution gives access to the data you need and does the hard work of pulling multiple tables into one - no technical database expertise needed.

Robust Data Visual Builder. Use dropdown menus to easily select data and create charts, graphs and tables.

Dynamic Data Visuals. Improve data analysis by leveraging tools such as drill down to create dynamic visuals in a few simple steps.

Streamlined Cross-Departmental Analysis. Save time by combining data from multiple modules to get a complete picture of performance.

User-Friendly Report and Dashboard Creation. Select any of your saved custom visuals to easily design branded reports or create dashboards.

Flexible Sharing Options. Share dashboards, analysis, visuals, and reports with other MemberSuite users and schedule reports to be delivered to anyone via email.

Build Visuals

Build charts, graphs, and tables and save them to your Visual Gallery. Leverage any visuals you create to design reports and dashboards.

The screenshot displays the MemberSuite interface for building visualizations. On the left is a navigation sidebar with categories like Event & Session, E-Marketing, Security & Audits, All Reports, Community, Analysis, Visuals, Dashboards, Authored Reports, and Help Center. The main area shows two data selection panels. The first panel, titled 'Invoices - Invoice Line Items', has a dropdown menu and a list of fields with checkboxes, including Product Category, Product Name, Invoice Line Quantity, Invoice Line Unit Price, Invoice Date, Invoice Line Total, Invoice Line Original Total, Invoice Line Balance Due, Invoice Line Description, Invoice Line Is Void, Invoice Line Amount Paid, Invoice Line Amount Refunded, Invoice Line Amount Written Off, Accounting Project, Amount To Pay Upon Creation, Argl Account, Billing Master, Billing Schedule Entry Id, Has Been Cogs Recognized, Late Fee Rule Id, Optional, Revenue GI Account, Revenue Recognition Template Id, and Invoice Line Total In Base Currency. The second panel, titled 'Invoice Line Items - CRM Individuals and Organizations', has a dropdown menu and a list of fields with checkboxes, including Name, First Name, Middle Name, Last Name, Age, Billing Contact Name, Billing Contact Phone Number, Billing Email Address, Company, Created By Name, Created Date, Date Of Birth, Designation, Do Not Email, Do Not Fax, Do Not Mail, Email Address, Email Address2, Email Address3, Facebook Profile, Facebook Id, Google Plus Url, Google Plus Id, Instagram Profile, Instagram Id, Job Postings Available, Last Modified By Name, Last Modified Date, Linked In Profile, Linked In Id, Media Code Id, Membership Id, Nick Name, Notes, Prefix, Primary Organization Roles, Primary Organization Id, Resume Access Until, Sort Name, Source Code Id, Suffix, Title, Twitter Handle, Twitter Id, and Web Site. Below these panels is a 'Select Data' dropdown and an 'Apply Column Selection' button. The bottom section shows two visualizations: a horizontal bar chart titled 'Sum of Invoice Line Total by AR Aging' and a chart titled 'Count of AR Aging by AR Aging'. The bar chart shows data for AR Aging categories: 0-30, 31-60, 61-120, and 120+. The x-axis is labeled 'Invoice Line Total' and ranges from 0k to 170k. The y-axis is labeled 'AR Aging'. The bar chart shows that the 0-30 category has the highest total, followed by 31-60, 61-120, and 120+.

Access and select data you need from any module in MemberSuite

Use dropdowns to build visuals

Easily visualize your data, change chart types, turn filters on/off, or swap data columns and watch visuals update in real time

Design Reports

Select any of your saved visuals to easily design, save, edit, duplicate, print, share, and schedule branded authored reports.

Report Studio Dashboards Report Center

Global Author: OFF

Self-Service

- Analysis
- Visuals
- Dashboards
- Authored Reports**
- Saved Reports
- Report Types
 - Financial
 - Order & Inventory
 - Billing
 - Membership **NEW**
 - Event & Session
 - E-Marketing
 - Exhibit
 - Security & Audits
- CAB **NEW**
- All Reports
- Community
- Analysis
- Visuals
- Dashboards

Authored Reports Search for Reports

AR Aging Design View
6/16/2022

Only 1 canned report may be added to the custom report. If more than 1 is added, the custom report will not work and will need to be deleted.

MemberSuite

AR AGING

Amount Outstanding

\$213,554.00

AR Aging Pie Graph

Total Outstanding for 61+

Age Group	Amount
0-30	\$147,349.00
31-60	\$22,585.00
61+	\$43,620.00

AR Aging Table

Name	Product Name	Invoice Name	Aging	Days Since Due	Invoice Line Total
Garlatti Landscaping Inc.	Renewal, Member	Invoice #7426520	61+	76	\$440.00
Merritt Properties	Renewal, Member	Invoice #7426516	61+	76	\$440.00
Midwest Snow Tech	Renewal, Member	Invoice #7426523	61+	76	\$440.00

View how the final report will be rendered before sharing with others

Drag and drop to add rows, spaces, visuals, images, links, and text to design your report

Choose multiple visuals from your Visual Gallery to tell your story

Create Dashboards

Select from your visuals and create dashboards to quickly monitor your organization's performance in real-time from one place.

The dashboard interface includes a left sidebar with navigation options: Global Author: OFF, Self-Service, Analysis, Visuals, Dashboards (highlighted), Authored Reports, Saved Reports, Report Types, Financial, Membership, Order & Inventory, Billing, Event & Session, E-Marketing, Security & Audits, All Reports, Community, Analysis, Visuals, Dashboards, Authored Reports, and Help Center. The main dashboard area is titled 'Dashboards' and contains a search bar for reports. It features three main visual components: a large KPI card for 'Total AR' showing \$67,763.70; a horizontal bar chart titled 'Top 10 Clients with 120+' listing clients and their AR values; and a vertical bar chart titled 'AR Aging' showing the distribution of AR by age group. A gauge chart at the bottom right shows the 'AR Goal for 120+' with a current value of \$67,763.70. A 'Dashboards' tab is visible at the top of the dashboard area.

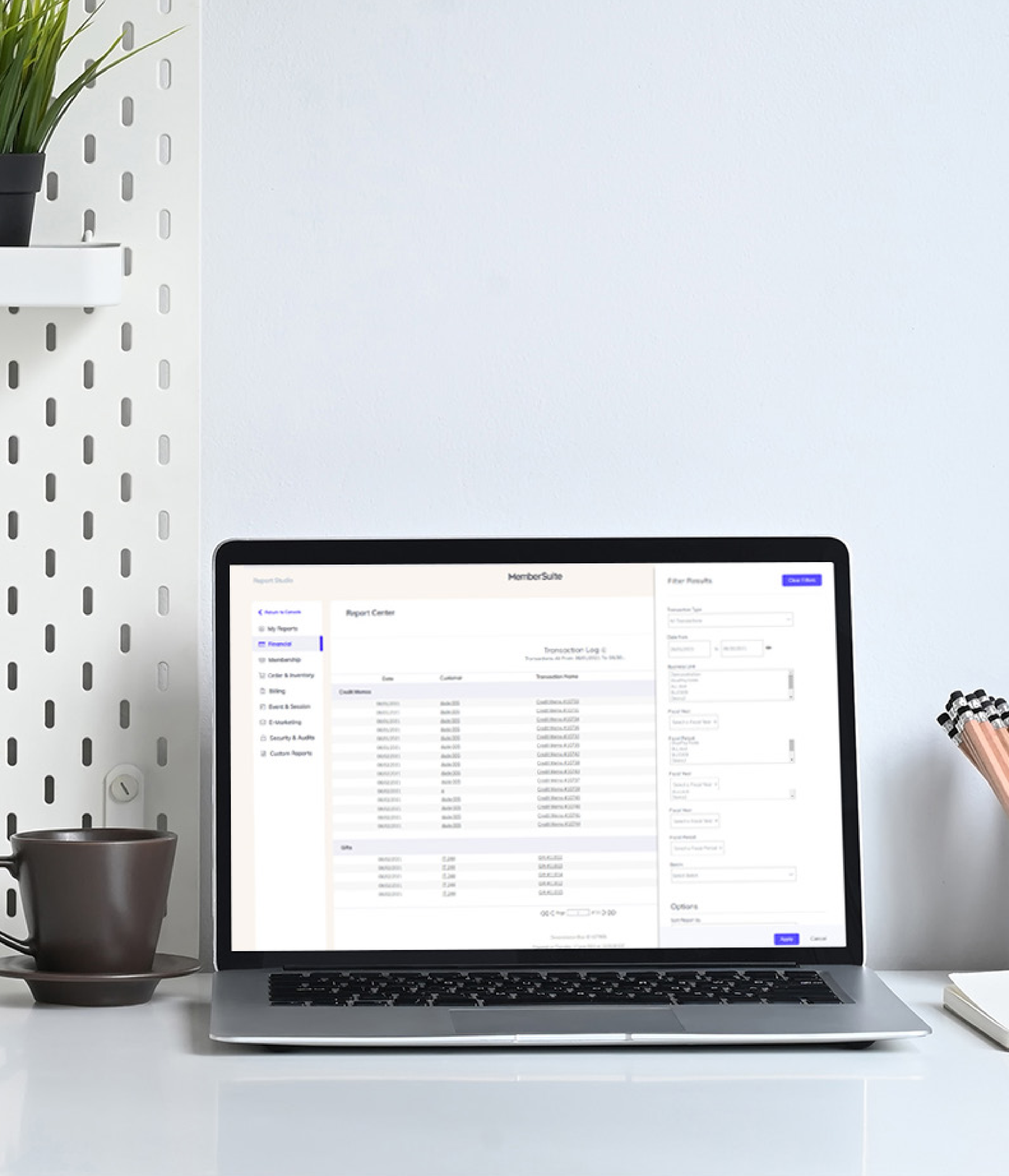
Name	AR Value
Metal Pless	\$17,100.00
JMS Snow Pusher	\$7,850.00
Nova Path Creations	\$3,000.00
Sonnhaller	\$2,677.00
Mineral Products, Inc.	\$2,580.00
Mark LaCombe	\$2,495.00
GVM, Inc.	\$1,710.00
Equifab	\$1,300.00
City of Atlanta	\$1,300.00
Midwest Salt, LLC	\$1,134.00

AR Aging	Invoice Line Total
120+	~150k
61-120	~30k
31-60	~45k
0-30	~80k

Quickly find and add multiple visuals from your Visual Gallery

Auto-save your dashboard and share it with other users

Add and rename dashboard tabs to organize your visuals



Interactive Reporting

Save Time with Highly Configurable Interactive Reports

Report Studio's Interactive Reporting gives you access to a wide variety of pre-built reports that can be tailored to display the information that is most meaningful to the way you do business.

Modern User Interface. Enjoy a modernized user interface that offers a great user experience.

60+ Standard Reports. Get access to a variety of pre-built reports to monitor Billing, Certifications, E-Marketing, Events, Sessions, Financials, Membership, Orders and Inventory.

Powerful Configuring Options. Configure reports to meet your needs by adding/removing columns, grouping, sorting and filtering.

Information icons. Hover over the icon to read the report's overview and understand its content.

Time-Saving Functionality. Quickly search and find reports and leverage the My Reports section to access any report you previously configured.

Automated Multi-Recipient Report Delivery. Leverage the robust report scheduler to deliver reports to multiple recipients in a variety of formats (Excel, PDF, etc.), for static or dynamic dates.

Quickly Share Reports. Share reports with other MemberSuite users and schedule reports to be delivered to anyone via email.

Find Reports

Leverage the user-friendly interface to browse the pre-built reports, save time, and start making sense of your data.

The screenshot displays the MemberSuite Report Center interface. On the left is a navigation sidebar with categories like 'Financial', 'Membership', and 'Order & Inventory'. The main area shows a 'Report Center' with a search bar and a list of report categories: 'Accounts Receivables and Invoices', 'Bank Reconciliation Reports', and 'Batch Reports'. Each category contains several report titles, each with an information icon. Callouts point to the search bar, the sidebar, and the information icons.

Report Studio

MemberSuite

Dashboards Report Center Self - Service

Return to Console

Help Center

My Reports

Financial

Membership

Order & Inventory

Billing

Event & Session

E-Marketing

Security & Audits

Custom Reports

All Reports

Report Center

Search for Reports

Accounts Receivables and Invoices

A/R Aging Analysis ⓘ

A/R Aging Detail No Subtotals ⓘ

AR Aging Detail ⓘ

A/R Aging Summary ⓘ

Pro Forma A/R Aging Detail ⓘ

Bank Reconciliation Reports

Check Reconciliation ⓘ

Credit Card Reconciliation ⓘ

Batch Reports

Batch Statistics ⓘ

Batch Status Listing ⓘ

Batch Transaction Detail ⓘ

Quickly search and find reports

Hover over the information icon to see a pop up that explains what the report is about and what data it includes

Browse the reporting categories or select "My Reports" to access previously configured reports

Configure Reports

Tailor any report to meet your data analysis needs by adding or removing columns, and grouping, sorting or filtering data.

The screenshot displays the MemberSuite Report Studio interface. On the left is a navigation sidebar with categories like Financial, Membership, Order & Inventory, Billing, Event & Session, E-Marketing, Security & Audits, and Custom Reports. The main area is titled 'Report Center' and shows a 'Transaction Log' report for the period from 06/01/2021 to 06/30/2021. The report is divided into two sections: 'Credit Memos' and 'Gifts'. The 'Credit Memos' section contains 14 rows of data, and the 'Gifts' section contains 5 rows. At the bottom of the report, there is a pagination control showing 'Page 1 of 13' and a footer with the text 'Demonstration Blue (ID #27969) Prepared on Thursday, 17 June 2021 at 13:29:28 EST'. On the right side, there is a 'Filter Results' panel with a 'Clear Filters' button. This panel includes several filter options: 'Transaction Type' (set to 'All Transactions'), 'Date from' (06/01/2021 to 06/30/2021), 'Business Unit' (a list including 'Demonstration', 'BluePay/Tests', 'BU_test', 'BU2309', and 'Demo2'), and three 'Fiscal Year' dropdown menus (all set to 'Select a Fiscal Year'). There are also 'Fiscal Period' and 'Batch' dropdown menus. At the bottom of the filter panel, there is an 'Options' section with a 'Sort Report by' dropdown and 'Apply' and 'Cancel' buttons.

Date	Customer	Transaction Name
Credit Memos		
06/01/2021	dude.005	Credit Memo #10733
06/01/2021	dude.005	Credit Memo #10731
06/01/2021	dude.005	Credit Memo #10734
06/01/2021	dude.005	Credit Memo #10736
06/01/2021	dude.005	Credit Memo #10732
06/01/2021	dude.005	Credit Memo #10735
06/02/2021	dude.005	Credit Memo #10742
06/02/2021	dude.005	Credit Memo #10738
06/02/2021	dude.005	Credit Memo #10743
06/02/2021	dude.005	Credit Memo #10737
06/02/2021	a	Credit Memo #10739
06/02/2021	dude.005	Credit Memo #10745
06/02/2021	dude.005	Credit Memo #10740
06/02/2021	dude.005	Credit Memo #10741
06/02/2021	dude.005	Credit Memo #10744
Gifts		
06/02/2021	IT_244	Gift #11811
06/02/2021	IT_244	Gift #11813
06/02/2021	IT_244	Gift #11814
06/02/2021	IT_244	Gift #11812
06/02/2021	IT_244	Gift #11815

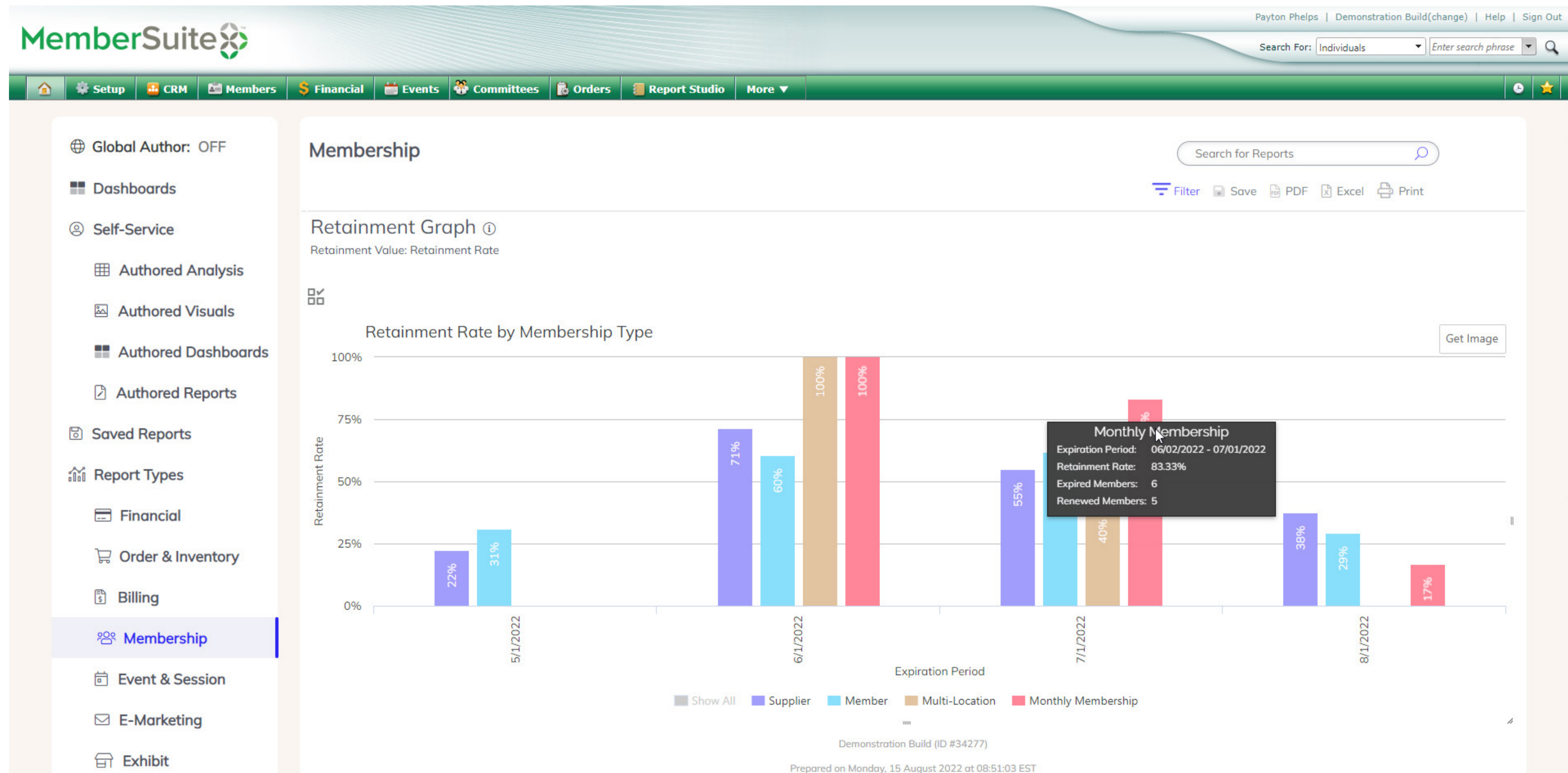
Schedule & Send Reports

Leverage the robust report scheduler to deliver reports to multiple recipients in a variety of formats (Excel, PDF, CSV, or HTML).

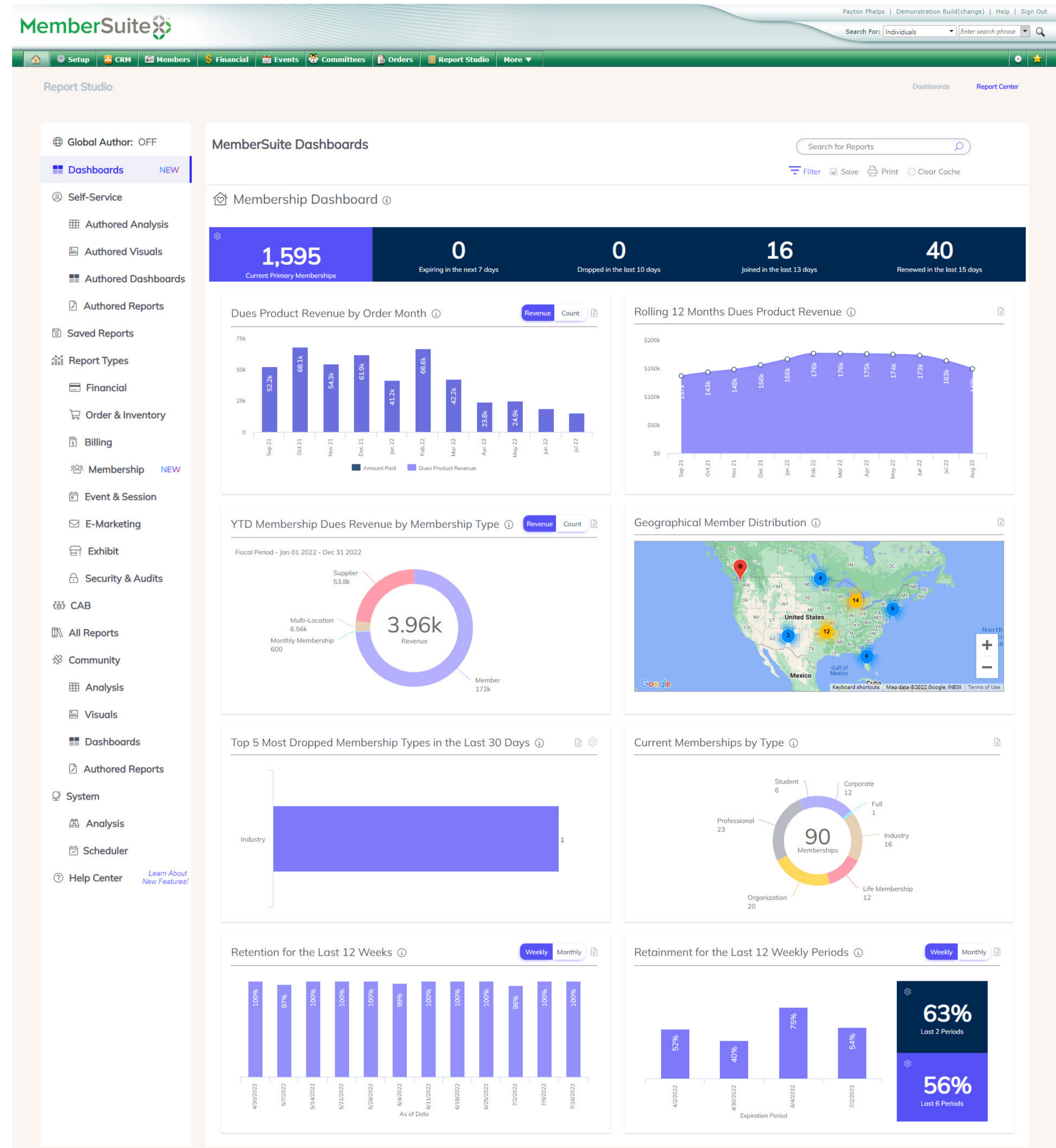
The screenshot displays the MemberSuite Report Studio interface. The top navigation bar includes 'Report Studio', 'MemberSuite', 'Dashboards', 'Report Center', and 'Self - Service'. A left sidebar contains navigation links: 'Return to Console', 'Help Center', 'My Reports' (highlighted), 'Financial', 'Membership', 'Order & Inventory', 'Billing', 'Event & Session', 'E-Marketing', 'Security & Audits', 'Custom Reports', and 'All Reports'. The main content area is titled 'Report Center' and features a search bar. Below this, a report titled 'Schedule Last weeks payments' is being configured. The configuration fields include: 'To' (pphelps@membersuite.com), 'Subject' (Scheduled Report - Last weeks payments), 'Body' (This report was scheduled by Payton Phelps), 'Format' (PDF), 'Schedule' (Daily), 'Every' (1 day(s)), 'Start Time' (08:00), 'Start Date' (6/21/2021), and an unchecked 'End Date' checkbox. A 'Save Schedule' button is located at the bottom of the configuration area.

Analyze Performance Based on Snapshots of Historic Data

Understand if members are renewing with our built-in Retention & Retainment Reports based on historic data snapshots that are stored in our data warehouse.



Dashboards & Analytics



Monitor Your Organization's Health

Report Studio's Dashboards offer built-in data analytics for CRM, Events, Financials and Membership to keep an eye on your organization's health.

Quick Data Monitoring. Quickly monitor performance for CRM, Events, Financials, and Membership and click on any value to drill down to the data and take action.

Configure Your Console Home Page. Choose the screen you want to land on every time you log into the staff console, including a specific report or dashboard.

Easy Filtering Options. Update the dashboard's data by selecting different filter options within each dashboard.

Data Download and Export. Quickly download charts and export dashboard data to Excel or PDF to investigate further.

Get a Snapshot of Membership

See membership count and revenue, geographical distribution, membership conversion rates, and more.

The dashboard provides a comprehensive overview of membership metrics. At the top, key statistics are displayed: 1,595 Current Primary Memberships, 0 Expiring in the next 7 days, 0 Dropped in the last 10 days, 16 Joined in the last 13 days, and 40 Renewed in the last 15 days.

Key Features and Callouts:

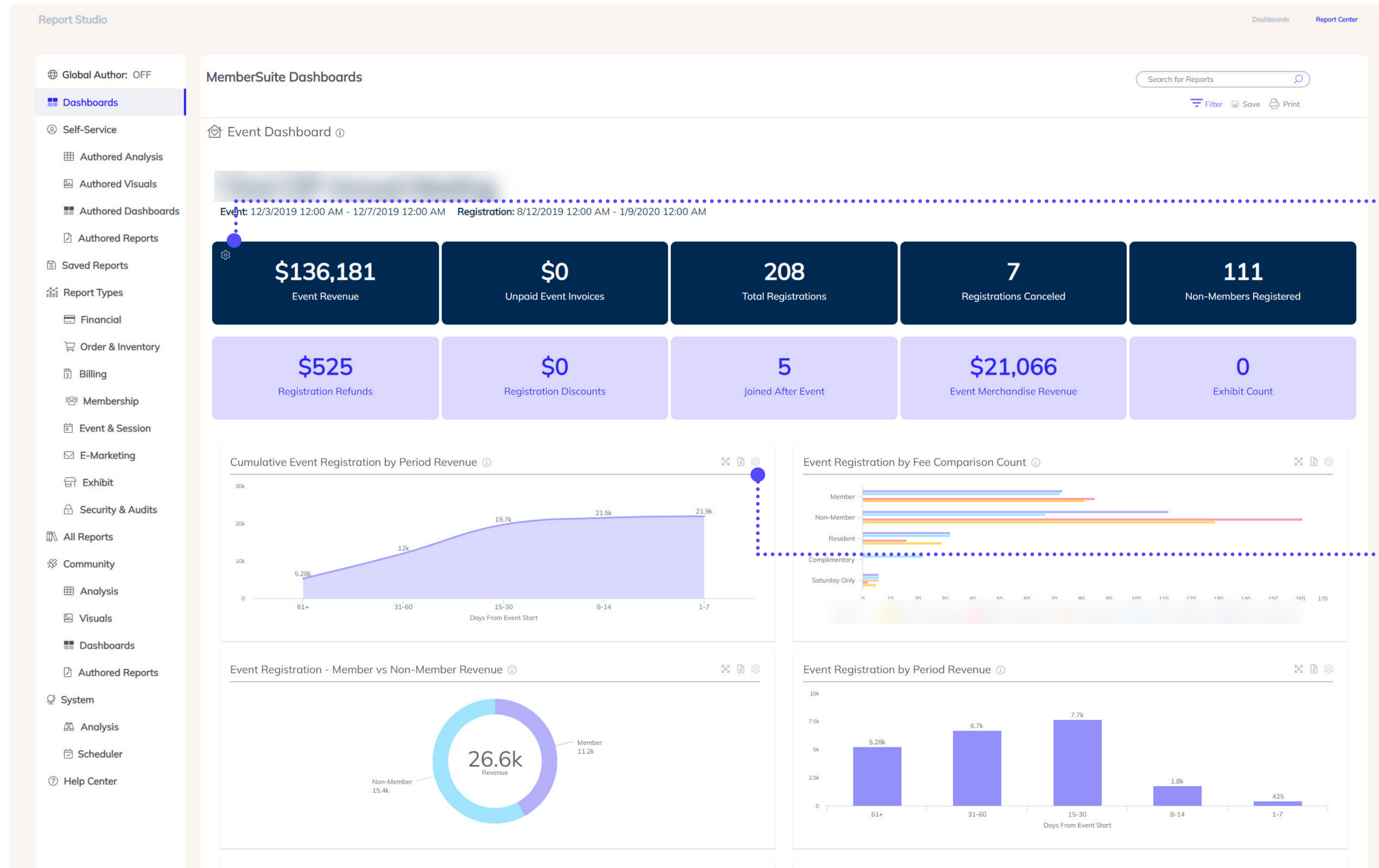
- Settings Icon:** Lets you update membership stats time frame (e.g. last 30 days).
- Chart Interaction:** Click on any value to see the filtered data, drill down, export to excel, and take action or investigate further.
- Export:** Quickly export the data behind a chart with one click.
- Chart Toggle:** Toggle between count and revenue to update the chart.

Dashboard Data:

- Dues Product Revenue by Order Month:** Shows monthly revenue trends from Sep 21 to Jul 22.
- Rolling 12 Months Dues Product Revenue:** Shows a continuous trend of revenue over the last 12 months.
- YTD Membership Dues Revenue by Membership Type:** A donut chart showing revenue breakdown for Fiscal Period Jan 01 2022 - Dec 31 2022. Total Revenue: 3.96k. Breakdown: Supplier (53.8k), Multi-Location (6.56k), Monthly Membership (600), Member (172k).
- Geographical Member Distribution:** A map showing member concentration across the United States and Mexico.
- Top 5 Most Dropped Membership Types in the Last 30 Days:** A bar chart showing the most common reasons for membership cancellations.
- Current Memberships by Type:** A donut chart showing the distribution of membership types: Student (6), Corporate (12), Full (1), Industry (16), Professional (23), totaling 90 Memberships.

See How Your Event is Trending

Track event registrations, see revenue at-a-glance, and get a summary of your event's performance to see how it's trending in comparison to previous events.



Settings icon lets you update the card view. You can choose from 30 different views.

Settings icon allows you to update the graph panel view. Choose between 12 different graphs.



MemberSuite

To learn more about MemberSuite,

Request a Demo

[Membersuite.com/request-a-demo](https://membersuite.com/request-a-demo)

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