

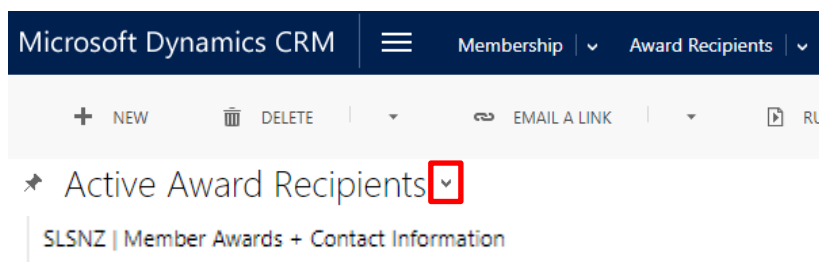
Running CRM Reports

Club Administrators may want to run reports on the following record types in the CRM database:

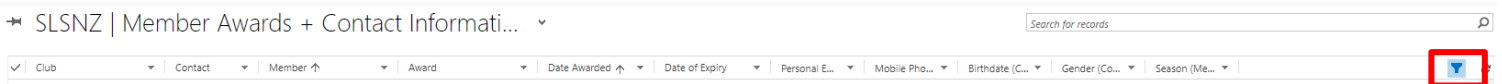
- Award reports,
- Member reports,
- Patrol reports.

1. Award Reports:

Head to Membership > Award Recipients. Drop down the menu from Active Award Recipients and change to one of our customised reports under My Views:



Turn on the filter option and see dropdown menus appear on each column:

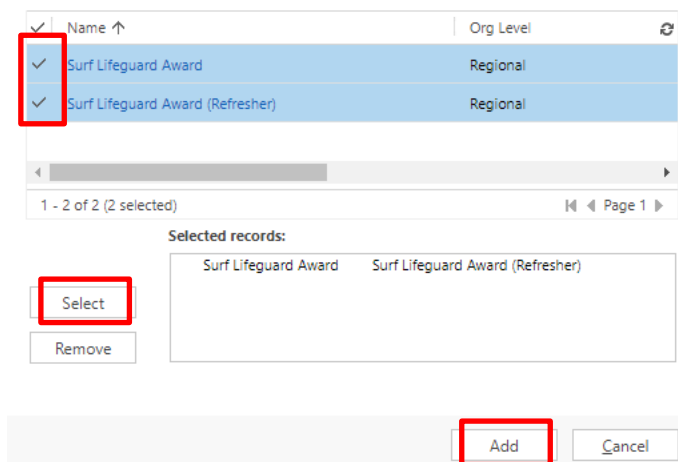
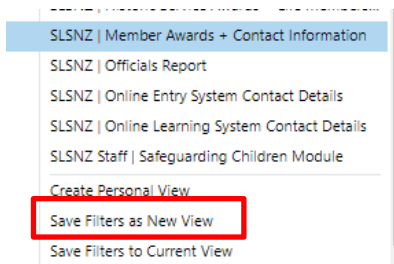


For example, if you wanted to filter a certain award type, click the dropdown arrow on the **Award** column and select **Filter by Specific Award**.

Tick, select and add all of the awards you want to filter by:

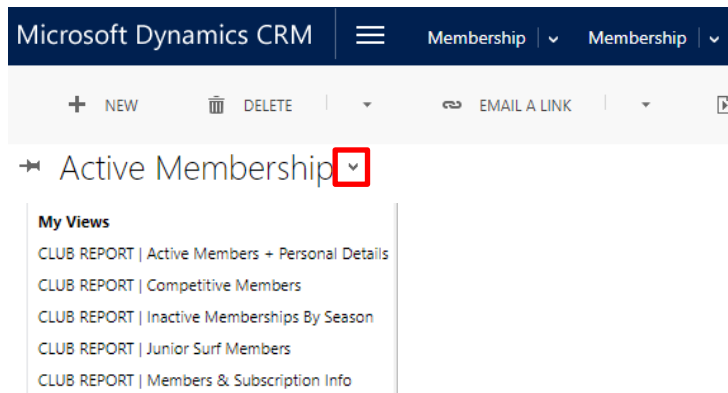
Hit **Export to Excel** if you wish to use the data further.

If you wish to keep your report, you can navigate to the bottom of the report list and select **Save Filters as New View** to keep coming back to:



2. Member Reports:

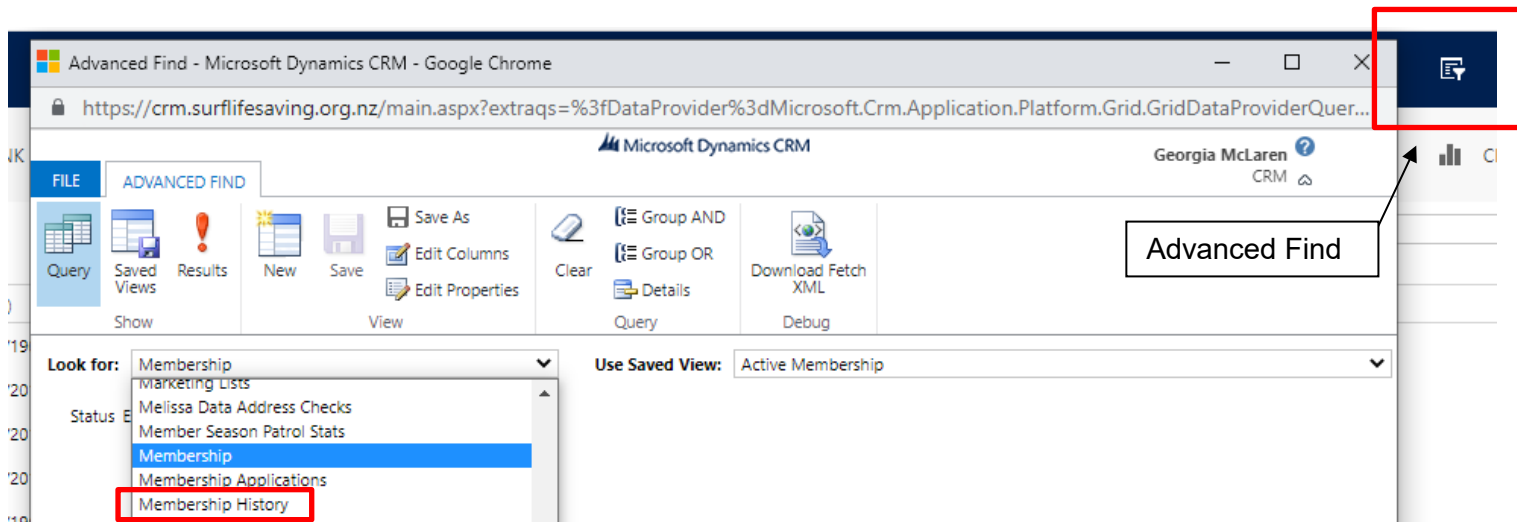
Head to Membership > Membership. Drop down the menu from Active Membership and change to one of our customised reports under My Views:



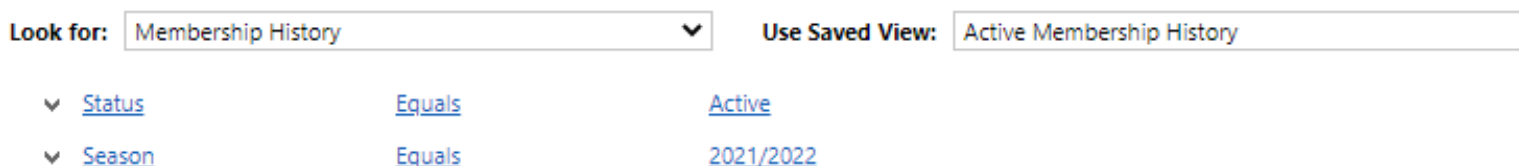
Your Active Membership shows you all of the records that you have rolled into the current season. Reports such as the **Active Members + Personal Details** gives you information like age and contact details for those members.

If you want member reports on a season(s) that is not the current season you need to navigate to the **Member Season History** area – this does not appear on the main Membership menu so can be a little trickier to find.

You need to open Advanced Find and change the record type to **Membership History**:



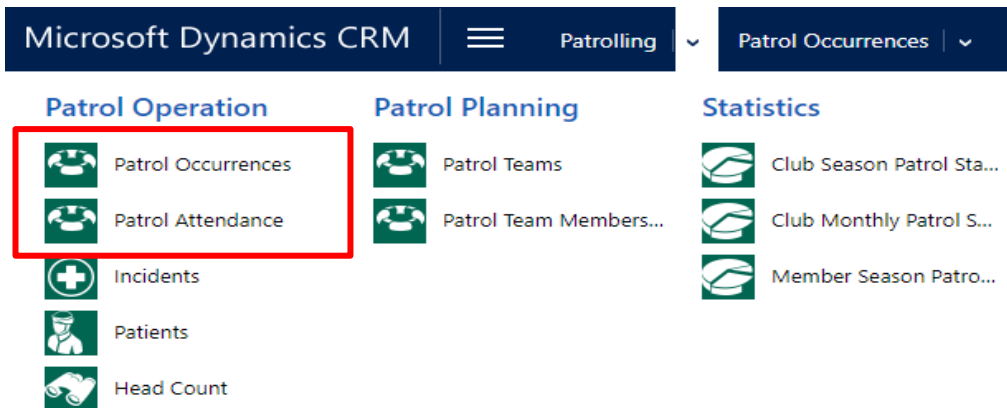
Make sure that the Use Saved View field is set to **Active Membership History**:



Then add the layers of search criteria you want, i.e. the season(s) you want to filter by.

3. Patrol Reports

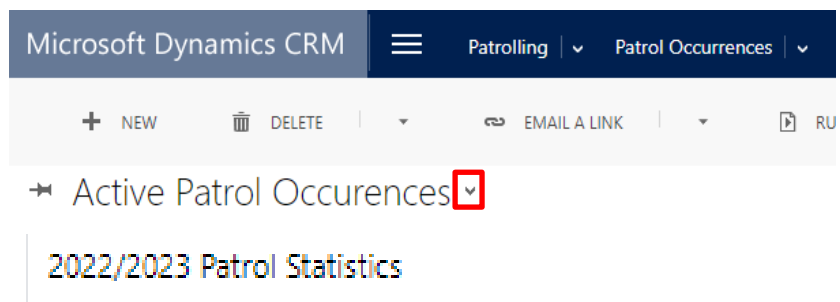
Head to Patrolling > Patrol Occurrences (for patrol data) or Patrol Attendance (for member hours).



Microsoft Dynamics CRM | Patrolling | Patrol Occurrences

- Patrol Operation**
 - Patrol Occurrences
 - Patrol Attendance
 - Incidents
 - Patients
 - Head Count
- Patrol Planning**
 - Patrol Teams
 - Patrol Team Members...
- Statistics**
 - Club Season Patrol Sta...
 - Club Monthly Patrol S...
 - Member Season Patro...

Patrol Occurrences:



Microsoft Dynamics CRM | Patrolling | Patrol Occurrences

+ NEW | DELETE | EMAIL A LINK | RU

➔ Active Patrol Occurrences

2022/2023 Patrol Statistics

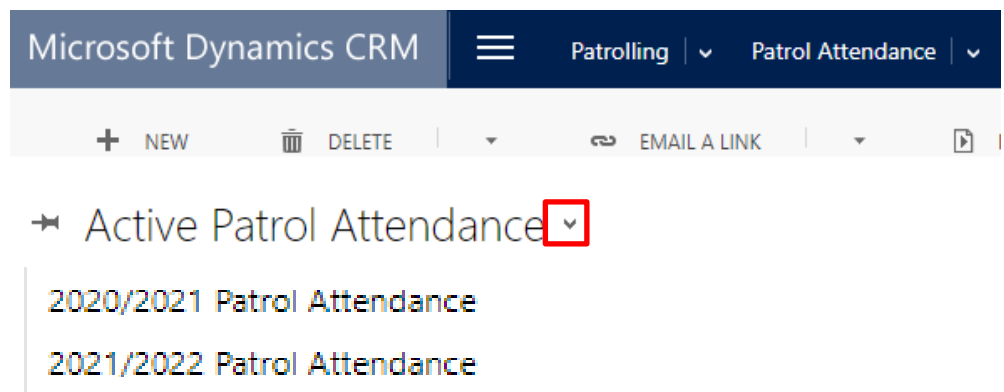
Drop down the menu from Active Patrol Occurrences and change to one of our customised reports under My Views (2022/2023 [or the current season] Patrol Statistics is a good start). This report includes most of the fields that lifeguards populate with on the Patrol Captains Form:

Total Volunt...	Num Volunt...	Num Peopl...	Num Peopl...	Num Peopl...	Num Minor...	Num Searc...	Num Preve...	Num Public...
44.25	8	3	0	0	0	0	23	48

You can export this report to Excel and use the Pivot Table or Sum tools to calculate data.

Patrol Attendance:

Drop down the menu from Active Patrol Attendance and change to one of our customised reports under My Views. These reports have been built to filter each season's attendance records and are a good way to get an accurate record of which lifeguards have been put on each patrol.



Microsoft Dynamics CRM | Patrolling | Patrol Attendance

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➔ Active Patrol Attendance

- 2020/2021 Patrol Attendance
- 2021/2022 Patrol Attendance