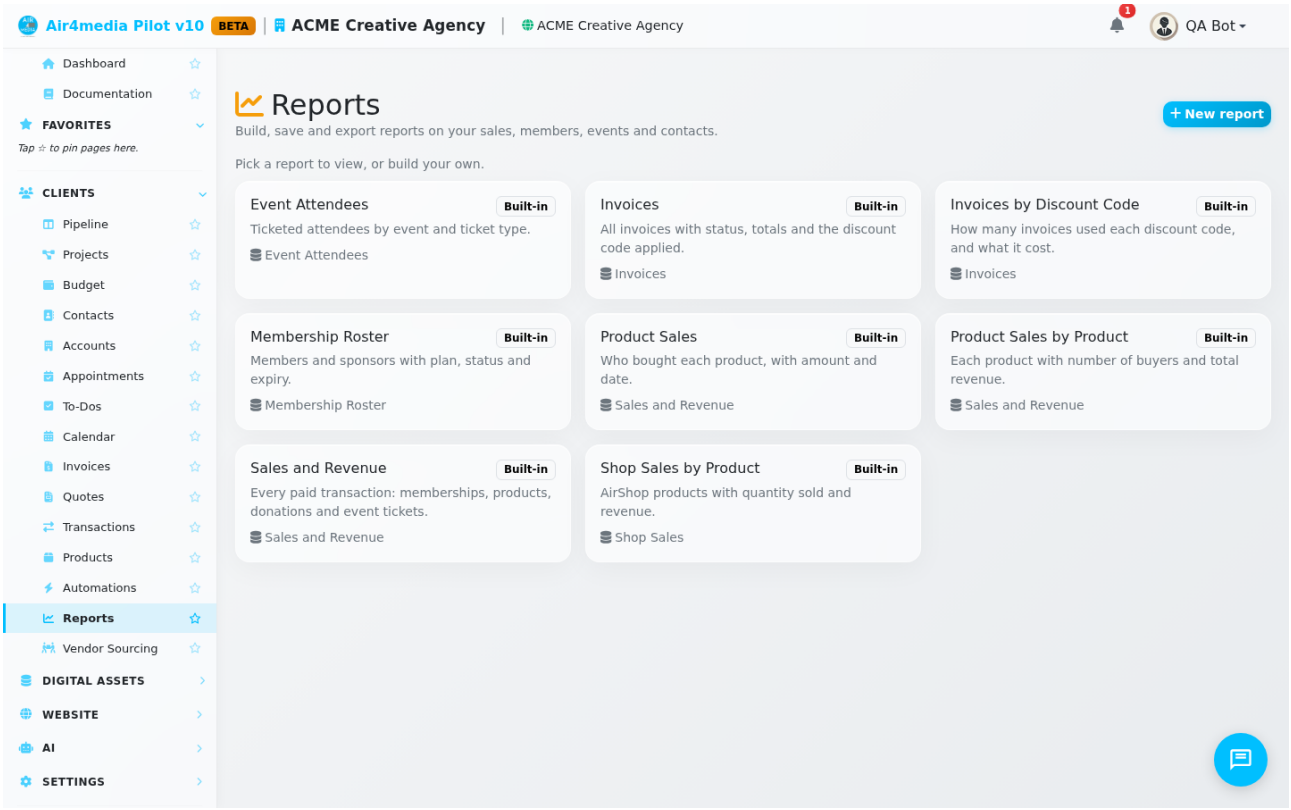

Reports

The Reports page gives you a live, searchable view of your account's key data — sales, invoices, memberships, events and contacts. ACME Creative Agency can pull up every invoice sent this quarter, see which membership plans are most popular, or get a full attendee list for a past event, then download any of it as a spreadsheet.

Key Features

- **Six report types**: Sales and Revenue, Shop Sales, Membership Roster, Event Attendees, Invoices, and Contacts. Each covers a different part of your account.
- **Custom columns**: Choose exactly which fields appear. No clutter — only the columns that matter to you.
- **Summarize by group**: Collapse rows into a summary. For example, group Shop Sales by product to see one row per item with total units sold and revenue.
- **Date range filter**: Narrow any report to a specific period using the From and To date pickers.
- **Dropdown filters**: Filter by status, category, or other attributes — for instance, show only paid invoices or only active members.
- **Live search**: Type to instantly find a contact, order, invoice number, or event.

- **Save custom reports**: Name and save any report configuration. It appears in your report picker for quick access next time.
- **Export to CSV**: Download up to 10,000 rows as a spreadsheet. Available to account owners and admins.

How to Use

1. Open **Reports** from the sidebar. The picker shows all built-in reports plus any reports your team has saved.
2. Click a report card to open it. Results load immediately — clicking **Invoices** shows ACME Creative Agency's full invoice list, newest first.
3. Use the **From** and **To** date fields at the top right, then click **Apply dates** to filter by a date range.
4. Click any column header to re-sort. Use the search box to find a specific name, email, or order number.
5. Click **Export CSV** to download the current view — filters and date range are included in the export.
6. To build a custom report, click **New report** (top right). Choose a data source, tick the columns you want, optionally pick a grouping and sort order, then click **Preview** to review the results.
7. Give the report a name and click **Save report**. It appears under "Your saved reports" on the picker.
8. To update or remove a saved report, open it and use the **Edit** or trash buttons in the header.

Tips

- The **Summarize by** option is ideal for totals at a glance — grouping Sales and Revenue by category instantly shows how much came from memberships versus event tickets.
- Built-in reports are always available and cannot be deleted. Use them as a quick starting point.
- Apply your filters and date range before clicking **Export CSV** — the download reflects exactly what is visible on screen.
- Saving and exporting reports requires an owner or admin role. Other team members can view reports but not download them.