

Reports Summary Guide

There are 6 reports available in Togeda:

1. Family Purchases
2. Family Open Balances
3. Transactions
4. Guardian Involvement
5. Family Contact Information
6. Program Report

Each of report is described in this document and available on the *Registration System Administrator Main Page* below the *Search Family Profiles* area.

1. Family Purchases

Description

This report provides a complete list of items and events that a family has purchased/donated or registered for. It also includes who (i.e. individual's name) the item is for and the amount paid.

Uses

- Identify how many people or families paid or signed-up for specific items.
- Identify how much money was collected for specific items.
- Identify the specific individuals that purchased or signed-up for a specific item or event.

Options

- Guardian 1 Profile Info (i.e. name, contact information, employer)
- Guardian 2 Profile Info (i.e. name, contact information, employer)
- "Not Completed" Family IDs

Notes

- A report is specific to an organization.
- Rows = Family ID (one row per family ID).
- Columns = Individual items that have been purchased/donated or registered for and selected optional fields.

2. Family Open Balances

Description

This report provides a complete list of

- Families that have placed items in their “cart”, but have **NOT** paid for them. It also includes who (i.e. individual’s name) the item is intended for and the amount for the item.
- Families that have not been “Checked Out” of that organization during registration, and thus have a “Not Completed” registration status.

Uses

- Identify how many people or families that have NOT paid for specific items that they intended to purchase/donate.

Suggested Action: Follow-up with specific guardians to pay for their intended items and donations.

- Identify families that have not completed the registration process.

Suggested Action: Follow-up with specific guardians to complete their online registration process, item selections/donations and payment.

- Identify test, duplicate and inactive accounts that can be deleted from the system.

Suggested Action: Provide us with the Family IDs that can be removed from the system.

Options

- Guardian 1 Profile Info (i.e. name, contact information, employer)
- Guardian 2 Profile Info (i.e. name, contact information, employer)
- “Not Completed” Family IDs

Notes

- A report is specific to an organization.
- Rows = Family ID (one row per family ID).
- Columns = Registration and organization station status, intended (un-paid) individual items/donations, and selected optional fields.

3. Transactions

Description

This report provides a complete list of every transaction that was processed in the Togeda registration system. It includes the following:

- Date/Time
- Payment Type (i.e. PayPal, manual card swipe, check, cash)
- Payment Type Details (i.e. check #, last 4-digits of card, installment plan)
- Total Payment
- Purchased Items Details (item name, specific individual, cost)

Uses

- Identify when, how and what was paid for confirmation, reconciliation, tracking and trend analysis purposes.

Options

- Guardian 1 Profile Info (i.e. name, contact information, employer)
- Guardian 2 Profile Info (i.e. name, contact information, employer)

Notes

- A report is specific to an organization.
- Rows = A single transaction.
- Columns = Transaction details and selected optional fields.

4. Guardian Involvement

Description

This report provides a complete list of the guardians that signed-up or showed interest in your volunteer items. It includes all of the volunteer items, the guardian(s) that selected a specific volunteer item, and the contact information for that guardian.

Uses

- Identify which guardians are interested in volunteer for in what ways (skills) and for what events, programs and organizations.

Suggested Action: Create a specific report for each organization and committee so that they can follow-up with those specific guardians.

Options

- Skills
- Events/Programs/Organizations
- Interests

Notes

- Rows = Family ID (one row per family ID).
- Columns = Guardian contact information and selected optional volunteer type items.

5. Family Contact Information

Description

This report provides everything captured in Step 2 (Family Information) and the eScrip information captured in Step 4 of the online registration process. This information includes:

- Family Individuals (guardians, students, siblings and adult family household members)
- Contact Information
- Directory Preferences
- Employer/Employment Information
- Languages Spoken
- Dietary Preferences
- Student Birth Month
- eScrip Information (If requested and submitted)

Uses

- Use specific data fields based on the family's directory preferences for a printed school directory.
- Identify business owners and employees of companies for potential sponsorships or auction donations.
- Identify guardians with specific cultural backgrounds based on the languages preferences for multi-cultural events and programs.
- Identify food requirements for meetings and events based on dietary preferences of attendees.
- Follow-up on eScrip renewal and sign-up activities.

Options

- Specific Grades
- "Not Completed" Family IDs

Notes

- Rows = Family ID (one row per family ID).
- Columns = Family and individual profile details.

6. Program Report

Description

This report provides a detailed list of individuals that selected a specific program item in Step 3 (Activities & Programs). It includes:

- Participant name, type, grade, gender, dietary preference, etc.
- Payment status and transaction details
- Guardian contact Information

Uses

- Identify specifically who signed up and paid for a program, event or
- Check-in rosters, sign-in sheets.
- Follow-up with specific families that were interested, but did not pay.

Options

- None

Notes

- Rows = Individual participant.
- Columns = Sign-up details.