Analytics and Reporting Training

The GiveSmart Fundraise Intermediate series of training sessions build on the Fundamentals with four additional sessions/topics, so you can make the most out of your GiveSmart Fundraise account. For more on the recordings, click here.

To learn more about the powerful capabilities of Analytics and Reporting, this class will dig in and help you uncover uses of the tools you already have access to. In the training we will: look at analytics beyond the campaign dashboard, uncover reporting functionality you may not be using, reveal how to review reports to maximize your campaign insights and more.

Agenda

- Analytics
    - Campaign
    - Navigation
    - Insights
    - Text Messages
    - Google Analytics
- Reporting
    - Search Transactions
    - Manage Pledges
    - Recurring Donations
    - Ticketing
    - Crowdfunding and Peer-to-Peer Fundraising
    - Contacts

Analytics and Reporting Class

Please note that the user interface has recently changed within GiveSmart Fundraise and the initial menuing will be different from what is currently in the video. Once past the initial navigation steps, the rest of the material should still be viable.

We will update the video to reflect this change as soon as possible.

Further Study

- Read all about the different Analytics and Reporting in the Reporting section in the Knowledge Center.
- Campaign Metrics
- Insights
- Manage Guests
- Text Analytics
- Texting Inbox
- Fundraiser Dashboard

- Connecting Google Analytics
- Export a Report of Donations and Donor Information
- Saved Reports
- Manage or Move Pledges and Donations
- Recurring Donation Reporting
- Create Lists from Contacts
- Add Form Elements
- Create New Form
- Using the Merchant Center
- Watch the other Intermediate level classes here.