



NEW: Transaction Bundle Summary Report. (released 4/26/2010)

This new report is available to all clients in the Reporting section. This is sure to be a favorite for treasurers and accounting staff!

The transaction bundle summary report allows you to review transaction activity and balances during any time period. After specifying a “start date” and “end date” it shows:

- The number of transactions or “transaction balance” available at the start date
- The number of transactions purchased during the period.
- The number of “free” transactions added for referrals or promotions during the period
- The number of transactions used and the type of use (ie, registration, membership, donation, merchandise) during the period
- The number of transactions or “transaction balance” available at the end date

The screenshot shows the Rainier Desktop interface with the Reporting section selected. The main window displays the 'Rainier Transaction Bundle Summary Report' for the period 1/1/2010 to 4/16/2010. The report includes a table for 'Transaction Bundle Purchases in Period' and a table for 'Transactions used in Period By Product'. Callouts 1 through 6 guide the user through the navigation steps. Callouts A, B, C, and D point to specific data points in the report. A reminder box states: 'REMINDER: transactions do not ever expire provided client renews their annual service agreement.'

1 Reporting

2 Rainier Transaction Bundle Summary

3 Rainier Transaction Bundle Summary

4 Start Date: 1/1/2010, End Date: 4/16/2010

5 View Report

6 View Report

Transaction Report For Period 1/1/2010 through 4/16/2010

Transaction Balance at 1/1/2010 : 2670.5 **A**

Transaction Bundle Purchases in Period

Purchase Date	Transaction Count	Effective Date	Expired Date
3/23/2010	2500	3/23/2010	3/18/2030
Total Purchased During Period	2500 B		
Total Expired During Period	0		

Transactions used in Period By Product

Registration	2692.0
Donation	55.5
Total	2747.5 C

Transaction Balance at 4/16/2010 : 2423 **D**

1 Go to Reporting in Rainier
2 Expand on the Organization custom Reports
3 Click on the Rainier Transactions Bundle Summary
4 Select your Start Date range
5 Enter your End Date range
6 Click the View Report

A The transaction balance available at the "start date".
B The number of transaction bundles purchased between "start date" and "end date".
C The number of transactions consumed between "start date" and "end date" - by type.
D The transaction balance available at the "end date".

REMINDER: transactions do not ever expire provided client renews their annual service agreement.