

AUGUST 2020 FEATURE RELEASE FOR WESHARE

WeShare Features Update

WeShare is excited to announce three new transaction activity reports now available for active giving opportunities, managing giving and second collections.

How to pull a Global Transaction Activity Report:

1. Login to new admin panel
2. Left side navigation
3. Click on Reports
4. Select Report Type: Transaction Activity
5. Enter a Date Range
6. Click Run Report
7. Run Export Report to download xlsx report

Date	Name	Envelope Id#	Giving Type	Activity	Amount	Payment Type
07/27/2020	Ann Ann	12	UAT testing 6/4/2020	Recurring	\$12.00	Credit Card
07/27/2020	Steve Marshall	8336	Sunday Collection	Recurring	\$18.00	Credit Card
07/26/2020	Nelson Bui	8297	Sunday Collection	Recurring	\$100.00	Credit Card
07/26/2020	Christine Parsons	8245	Sunday Collection	Recurring	\$60.00	Credit Card
07/26/2020	Shelia Scurmelle	8276	Sunday Collection	Recurring	\$25.00	Credit Card
07/26/2020	May Frances Barwick	8331	Sunday Collection	Recurring	\$16.50	Credit Card
07/26/2020	John & Summer Marsh	8300	Sunday Collection	Recurring	\$35.00	Credit Card
07/26/2020	Steve Rodgers		test33	Recurring	\$10.00	Credit Card
07/26/2020	Michael York	8266	Sunday Collection	Recurring	\$17.00	Credit Card
07/25/2020	Anna Marshall	8352	Sunday Collection	Recurring	\$100.00	Credit Card
					\$12,596.17	

Activity	Total Amount	Number of Us...	Ave/User	Avg/Transacti...
Total Transactions	\$8,979.00	50	\$179.58	\$109.50
Purchase	\$83.00	2	\$41.50	\$20.75
Recurring	\$6,962.00	48	\$145.04	\$99.46
One Time	\$1,934.00	2	\$967.00	\$241.75

Summary: A break down of different transaction totals received for the chosen Date Range.

Activity Column	Different types of available activities
Total Amount Column	Different transaction totals for each displayed activity
Number of Users	Total number of users
Ave/User Column	Average transaction amount per user
Avg/Transaction Column	Average transaction amount per activity
Total Transactions	Total amount of transactions for all activities
Purchase	Total transaction amount for active Events
Recurring	Total recurring transaction amount for active Collections
One Time	Total one time transaction amount for active Collections
Donation	New feature! Total recurring transaction for active Second Collections.
Payment	New feature! Total payments for Collections with payment flag set.

AUGUST 2020 FEATURE RELEASE FOR WESHARE

Giving Opportunity

To Pull a Transaction Activity Report:

1. Login to new admin panel
2. Left side navigation
3. Click on Giving
4. Select Giving Opportunity
5. Click to manage giving
6. Within the secondary navigation click on Transaction Activity
7. Enter a Date Range
8. Click Run Report
9. Run Export Report to download xlsx report

Edit Form

1. Transaction Activity
2. Go to Form column, click on the Edit Form icon

The screenshot displays the Transaction Activity Report interface. At the top, there is a 'Date Range' selector set to '06/28/2020 - 07/28/2020' and a 'Run Report' button. Below this is a search bar with the text 'Enter Search Text Here' and a 'Show/Hide Columns' icon. The main table has a header 'Drag columns to group here' and contains two rows of transaction data. The first row shows a transaction on 07/28/2020 for \$25.00, and the second row shows a transaction on 07/28/2020 for \$10.00. The total amount for both is \$35.00. Below the table is a 'Summary' section with a table showing the total amount, number of transactions, and average values.

Date	Name	Envelo...	Giving Type	Activity	Amount	Payment Type	Form
07/28/2020			UAT testing 7/22/2020	One Time	\$25.00	Credit Card	Edit Form
07/28/2020			UAT testing 7/22/2020	One Time	\$10.00	Credit Card	Edit Form
					\$35.00		

Activity	Total Am...	Number ...	Ave/User	Avg/Tran...
Total Transactions	\$35.00	2	\$17.50	\$17.50
One Time	\$35.00	2	\$17.50	\$17.50

Second Collections Transaction Activity Report

1. Login to new admin panel
2. Left side navigation
3. Click on Giving
4. Select Second Collection
5. Click to manage giving
6. Within the secondary navigation click on Transaction Activity
7. Enter a Date Range
8. Click Run Report
9. Run Export Report to download xlsx report