

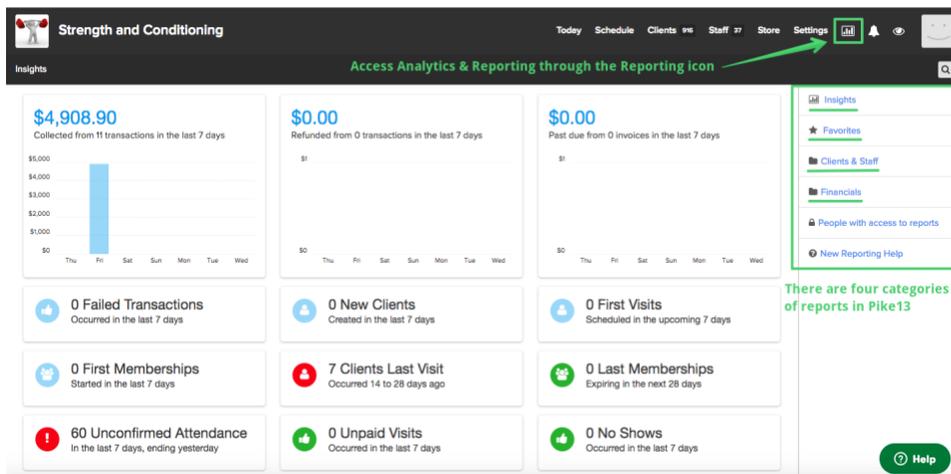
## PIKE13 REPORTING OVERVIEW

Thank you for using Pike13 to support your business! There is a wealth of information just a few clicks away! To get there, let's talk about some basic reporting features in your site.

1. First, navigate to the reporting categories available in Pike13. At the top of any Pike13 page, select **Analytics & Reporting**  found in the upper right of the navigation banner.

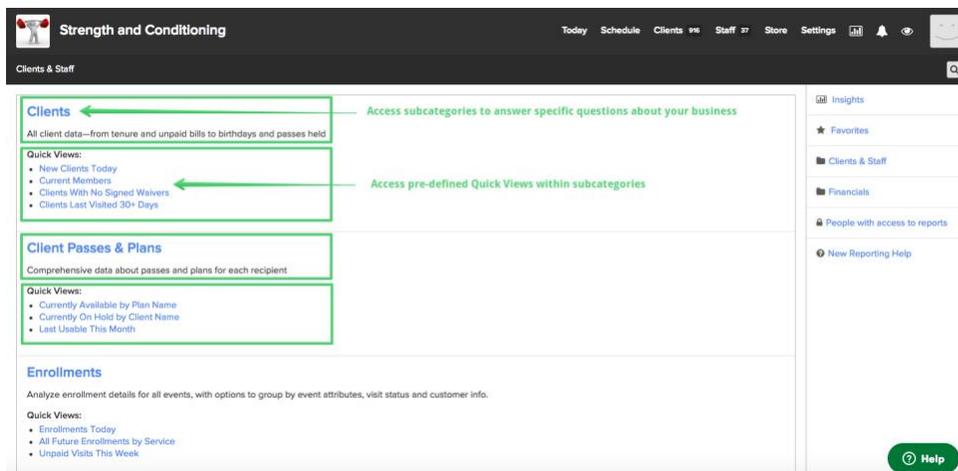
The initial view of reporting can be the **Insights dashboard** (see this Professional feature [here](#)), which provides a quick and easy overview of your key performance indicators. Green highlights areas of strength within your business while red highlights areas that require immediate attention. Blue indicates a neutral status in the data. Click on a tile to drill down to the detail view.

Next, select either **Clients & Staff** or **Financials** to access the subcategories and refine your view.

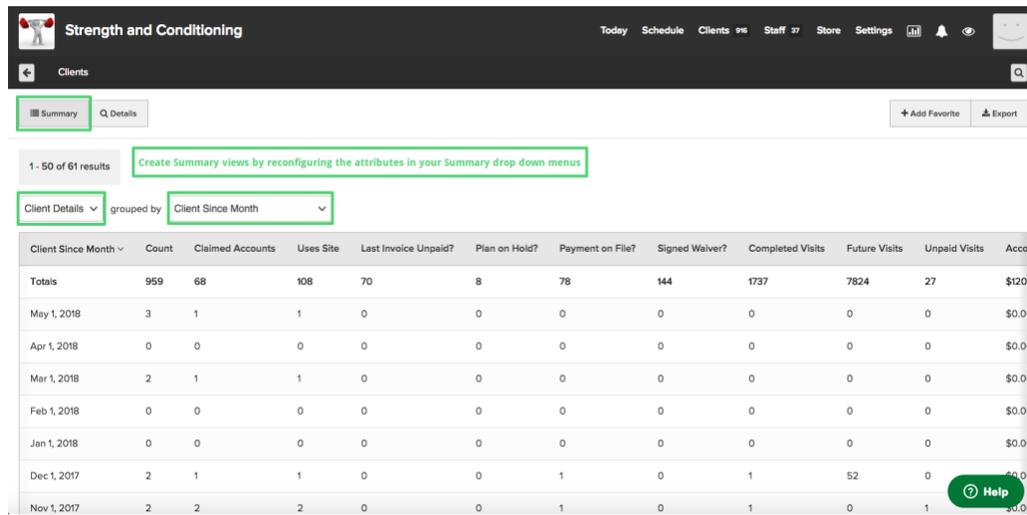


2. There are subcategories within each reporting category. Click on the headings to access the data of each subcategory, (For example, *Clients*, *Client Passes & Plans*, *Enrollments*, etc.) Check out our Help Center for more information regarding these [subcategories](#).

*Quick Views* are also available within each subcategory. These are pre-built reports where the filters, ordering, and grouping are already defined. They are good examples of how to structure a report and aim to answer our most frequently asked reporting questions.



3. The **Summary** View will be the initial landing point within any reporting subcategory. You can control how you view the summarized data by changing the attributes displayed and how they are grouped from the drop down menus in the top left of the Summary page.



Strength and Conditioning

Today Schedule Clients 98 Staff 27 Store Settings

Summary Q Details + Add Favorite Export

1 - 50 of 61 results

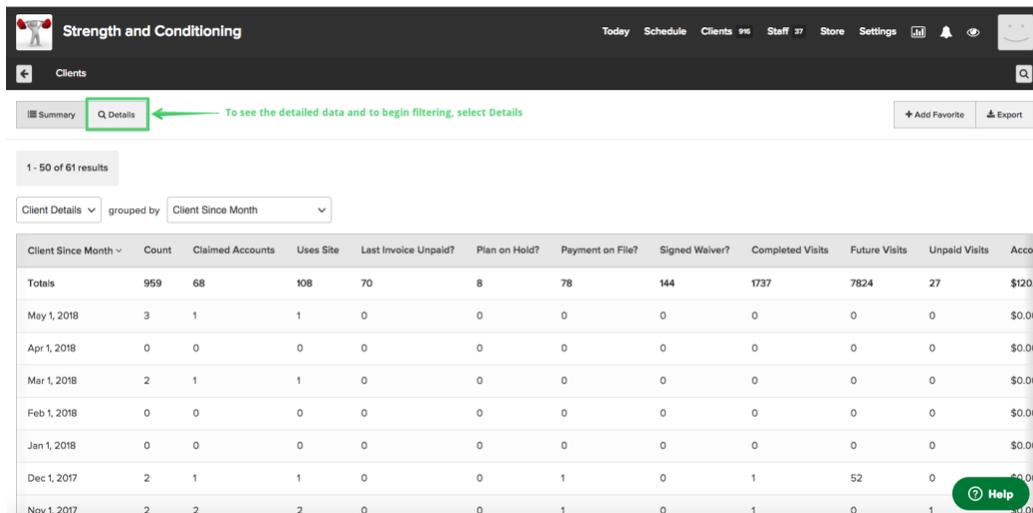
Create Summary views by reconfiguring the attributes in your Summary drop down menus

Client Details grouped by Client Since Month

Client Since Month	Count	Claimed Accounts	Uses Site	Last Invoice Unpaid?	Plan on Hold?	Payment on File?	Signed Waiver?	Completed Visits	Future Visits	Unpaid Visits	Acco
Totals	959	68	108	70	8	78	144	1737	7824	27	\$120.
May 1, 2018	3	1	1	0	0	0	0	0	0	0	\$0.00
Apr 1, 2018	0	0	0	0	0	0	0	0	0	0	\$0.00
Mar 1, 2018	2	1	1	0	0	0	0	0	0	0	\$0.00
Feb 1, 2018	0	0	0	0	0	0	0	0	0	0	\$0.00
Jan 1, 2018	0	0	0	0	0	0	0	0	0	0	\$0.00
Dec 1, 2017	2	1	1	0	0	1	0	1	52	0	\$0.00
Nov 1, 2017	2	2	2	0	0	1	0	1	0	1	\$0.00

Help

4. To see the detailed data that the report summarizes, select **Details**. Add filters to refine your search in the Details of the report. To see the data totals again, select **Summary**.



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1 - 50 of 61 results

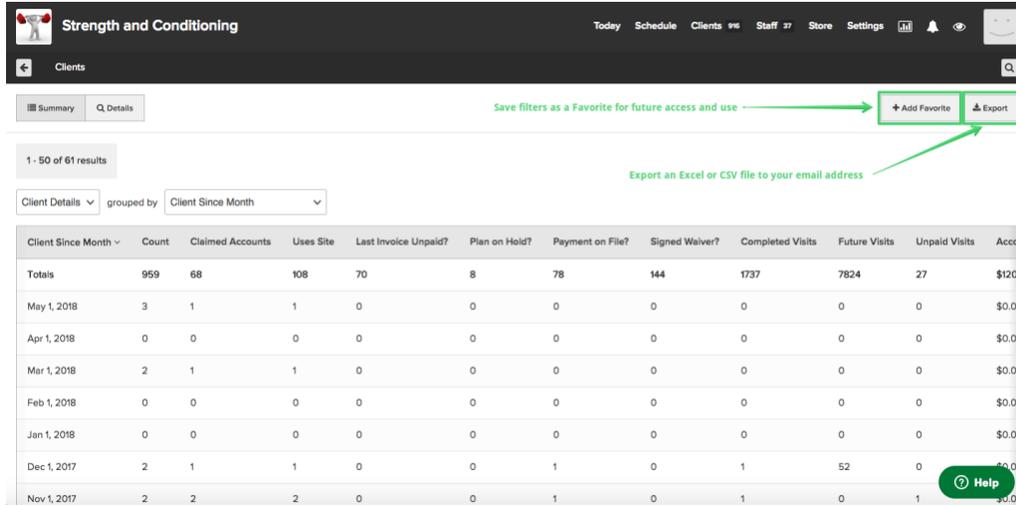
To see the detailed data and to begin filtering, select Details

Client Details grouped by Client Since Month

Client Since Month	Count	Claimed Accounts	Uses Site	Last Invoice Unpaid?	Plan on Hold?	Payment on File?	Signed Waiver?	Completed Visits	Future Visits	Unpaid Visits	Acco
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Nov 1, 2017	2	2	2	0	0	1	0	1	0	1	\$0.00

Help

5. You can save reports you've built for future use by adding them as a Favorite. Select the **+ Add Favorite** button in the upper right. On the resulting window, make sure **Save a New One** is checked, enter a name, a description for the report, and click **Save**. Clicking the **Export** button in the upper right, will send you a data file of the report. You can choose between a CSV or an Excel file. Download the report from the email sent to your inbox.



The screenshot shows the 'Strength and Conditioning' dashboard. At the top right, there are navigation links: Today, Schedule, Clients (98), Staff (37), Store, and Settings. Below the navigation is a search bar and a 'Clients' section. In the 'Clients' section, there are two buttons: '+ Add Favorite' and 'Export'. A green arrow points from the text 'Save filters as a Favorite for future access and use' to the '+ Add Favorite' button. Another green arrow points from the text 'Export an Excel or CSV file to your email address' to the 'Export' button. Below the buttons, there is a table with columns: Client Since Month, Count, Claimed Accounts, Uses Site, Last Invoice Unpaid?, Plan on Hold?, Payment on File?, Signed Waiver?, Completed Visits, Future Visits, Unpaid Visits, and Acco. The table has a 'Totals' row and several rows for months from May 1, 2018, down to Nov 1, 2017. A 'Help' button is visible in the bottom right corner of the table area.

Client Since Month	Count	Claimed Accounts	Uses Site	Last Invoice Unpaid?	Plan on Hold?	Payment on File?	Signed Waiver?	Completed Visits	Future Visits	Unpaid Visits	Acco
Totals	959	68	108	70	8	78	144	1737	7824	27	\$120
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Dec 1, 2017	2	1	1	0	0	1	0	1	52	0	\$0.00
Nov 1, 2017	2	2	2	0	0	1	0	1	0	1	\$0.00