

# MAY 2020 FEATURE RELEASE FOR WESHARE

## WeShare Features Update

WeShare is excited to announce updates to the reporting feature! Now admins are able to view the Account Transaction History for a registered user and utilize three chart views (line, bar, and pie), as well as filtering, search, page total, and show/hide columns. The new Donor Activity Report also has filtering, search, and show/hide column capabilities.

## View Account History for a Registered User

1. Login to the WeShare admin panel and in the left side navigation click on Users then Manage Users.
2. Search for a Username and in the left navigation under Account and Click History.

Date	Change ...	Opportu...	Giving Op...	Transacti...	Payment ...	Status	Amount	Transacti...	Receipt
Opportunity Type: Collection (18 Items)							\$20,605.00		
Giving Opportunity: Contributions (10 Items)							\$75.00		
12/27/2...	Joni Reese	Collection	Contributions	02836188500...	Account endl...	Completed	\$25.00	One Time	<a href="#">Print</a>
03/12/2...	Joni Reese	Collection	Contributions	02900634590...	Account endl...	Completed	\$5.00	One Time	<a href="#">Print</a>
05/21/2...	Joni Reese	Collection	Contributions	02961288090...	Account endl...	Completed	\$5.00	One Time	<a href="#">Print</a>
08/07/2...	-	Collection	Contributions	03028823540...	Joni Reese's ...	Completed	\$5.00	Recurring	<a href="#">Print</a>
10/18/2...	Joni Reese	Collection	Contributions	03090708140...	Joni Reese's ...	Completed	\$5.00	One Time	<a href="#">Print</a>
11/19/2...	Joni Reese	Collection	Contributions	03118603980...	Joni Reese's ...	Completed	\$5.00	One Time	<a href="#">Print</a>
11/19/2...	Joni Reese	Collection	Contributions	03119049210...	Joni Reese's ...	Completed	\$5.00	One Time	<a href="#">Print</a>
12/17/2...	Joni Reese	Collection	Contributions	03142792440...	Joni Reese's ...	Completed	\$5.00	One Time	<a href="#">Print</a>
01/17/2...	-	Collection	Contributions	03169691540...	Joni's Chase ...	Completed	\$10.00	Recurring	<a href="#">Print</a>
01/28/2...	Joni Reese	Collection	Contributions	03179042550...	Joni Reese's ...	Completed	\$5.00	One Time	<a href="#">Print</a>
Giving Opportunity: Angel Fund (4 Items)							\$20.00		
Giving Opportunity: St. Vincent de Paul (1 Items)							\$5.00		
Giving Opportunity: Human Concerns (2 Items)							\$505.00		
Giving Opportunity: Brew N Chew Auction Office Only (1 Items)							\$20,000.00		
							\$20,605.00		

## New Reporting Capabilities

You now have the option to filter your search, show/hide columns, and view charts (line, bar & pie graphs).

Column Name	Checked
Select All	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>
Year	<input type="checkbox"/>
Month/Year	<input type="checkbox"/>
Change Made By	<input type="checkbox"/>
Opportunity Type	<input type="checkbox"/>
Giving Opportunity	<input checked="" type="checkbox"/>
Transaction Id	<input checked="" type="checkbox"/>
Payment Source	<input checked="" type="checkbox"/>
Payment Type	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Amount	<input checked="" type="checkbox"/>
Transaction Type	<input checked="" type="checkbox"/>
Receipt	<input checked="" type="checkbox"/>