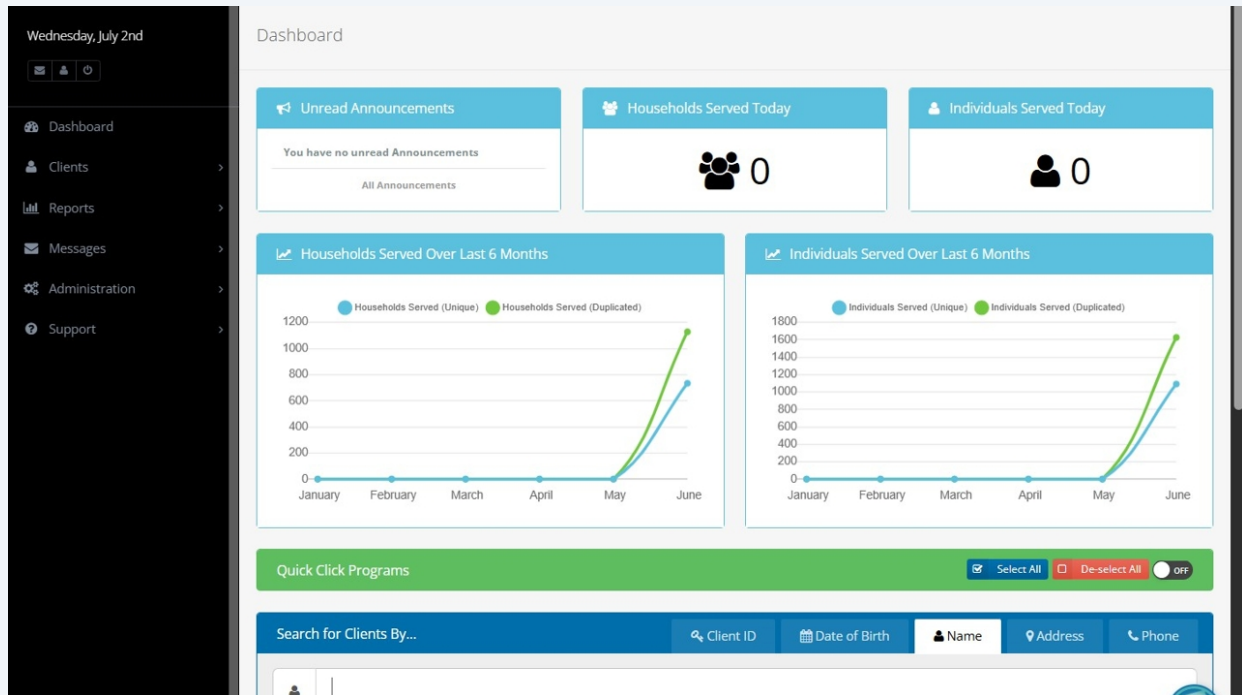


Creating a Monthly Statistics Report in Link2Feed

1 Login to your L2F Account and open Case Management as usual

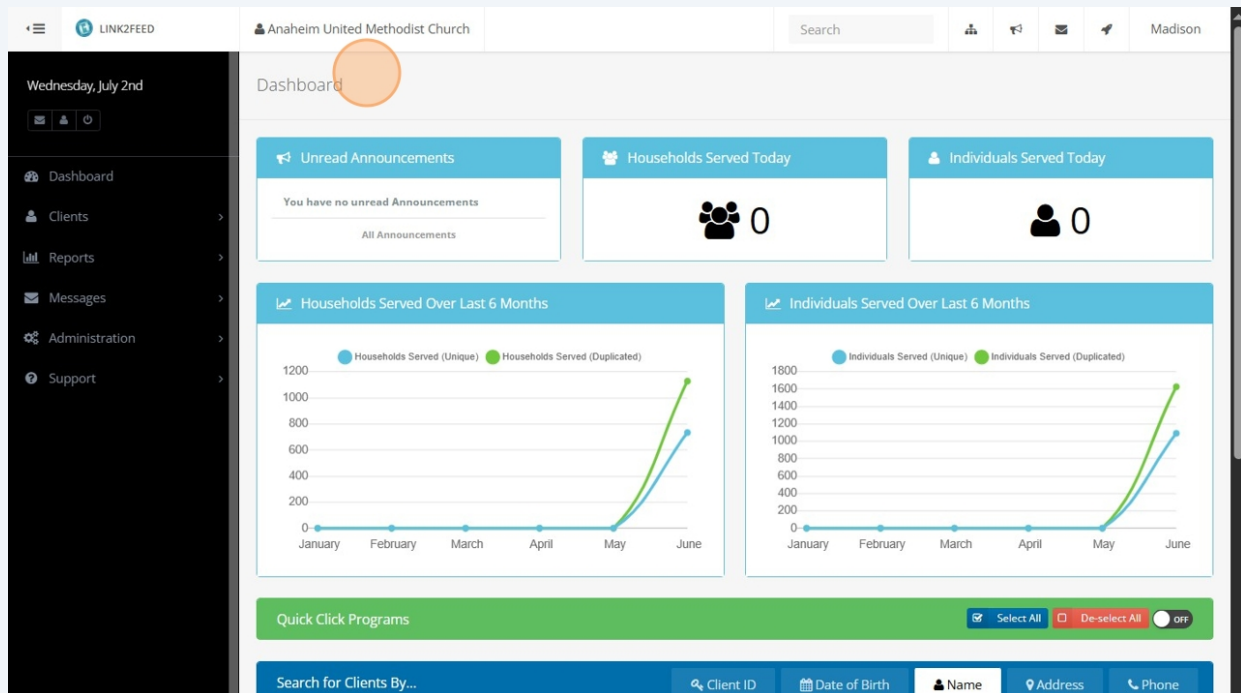


2

On the main Dashboard, you will see 'Households Served Over the Last 6 months' as well as 'Individuals Served Over the Last 6 Months'.

If you hover over the Blue Dots on each month, you will see the Unique numbers for each month.

If you do not have this view on your dashboard - please reach out to SHFBOC and we can help to add this view to your dashboard.



3 Click "Reports"

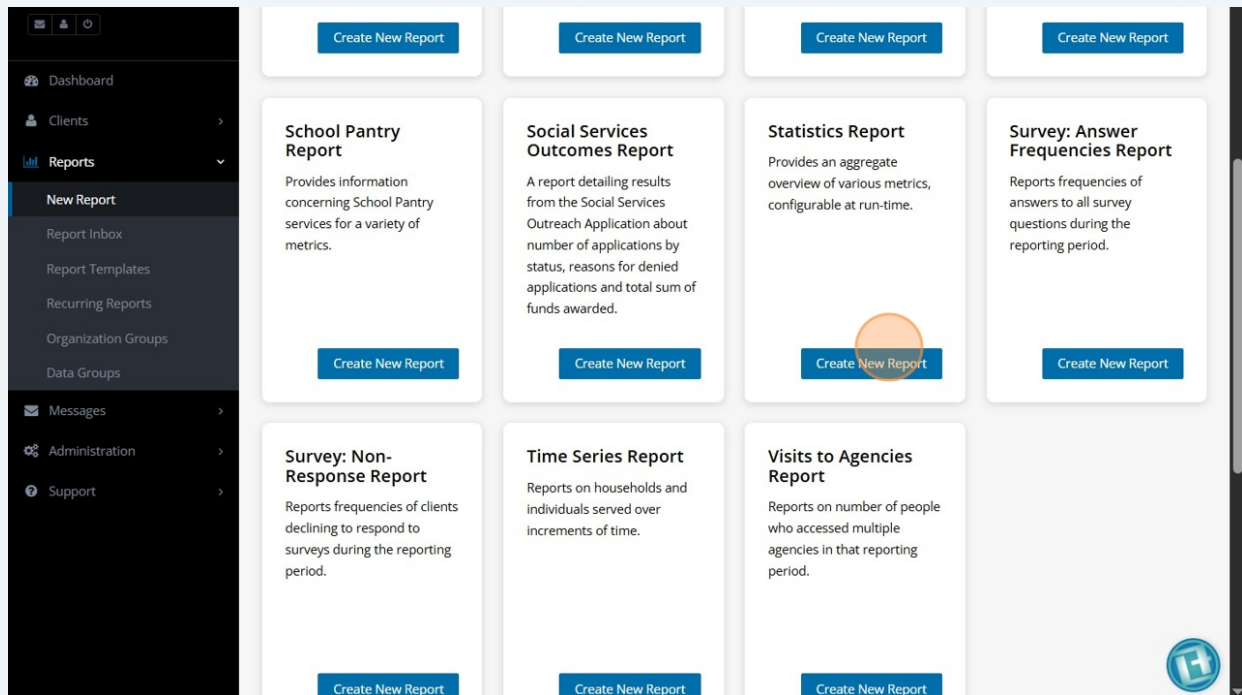
The screenshot shows the LINK2FEED dashboard for Anaheim United Methodist Church. The left sidebar contains a menu with the following items: Dashboard, Clients, Reports, Messages, Administration, and Support. The 'Reports' item is highlighted with a blue bar and a magnifying glass. The main dashboard area displays several widgets: 'Unread Announcements' (showing 0), 'Households Served Today' (showing 0), 'Individuals Served Today' (showing 0), 'Households Served Over Last 6 Months' (line chart), and 'Individuals Served Over Last 6 Months' (line chart). The bottom of the dashboard features a 'Quick Click Programs' section with 'Select All', 'De-select All', and 'Off' buttons, and a 'Search for Clients By...' section with filters for Client ID, Date of Birth, Name, Address, and Phone.

4 Click "New Report"

The screenshot shows the LINK2FEED dashboard for Anaheim United Methodist Church. The left sidebar contains a menu with the following items: Dashboard, Clients, Reports, Messages, Administration, and Support. The 'Reports' item is highlighted with a blue bar. Under the 'Reports' menu, the 'New Report' option is highlighted with a magnifying glass. The main dashboard area displays several widgets: 'Unread Announcements' (showing 0), 'Households Served Today' (showing 0), 'Individuals Served Today' (showing 0), 'Households Served Over Last 6 Months' (line chart), and 'Individuals Served Over Last 6 Months' (line chart). The bottom of the dashboard features a 'Quick Click Programs' section with 'Select All', 'De-select All', and 'Off' buttons, and a 'Search for Clients By...' section with filters for Client ID, Date of Birth, Name, Address, and Phone.

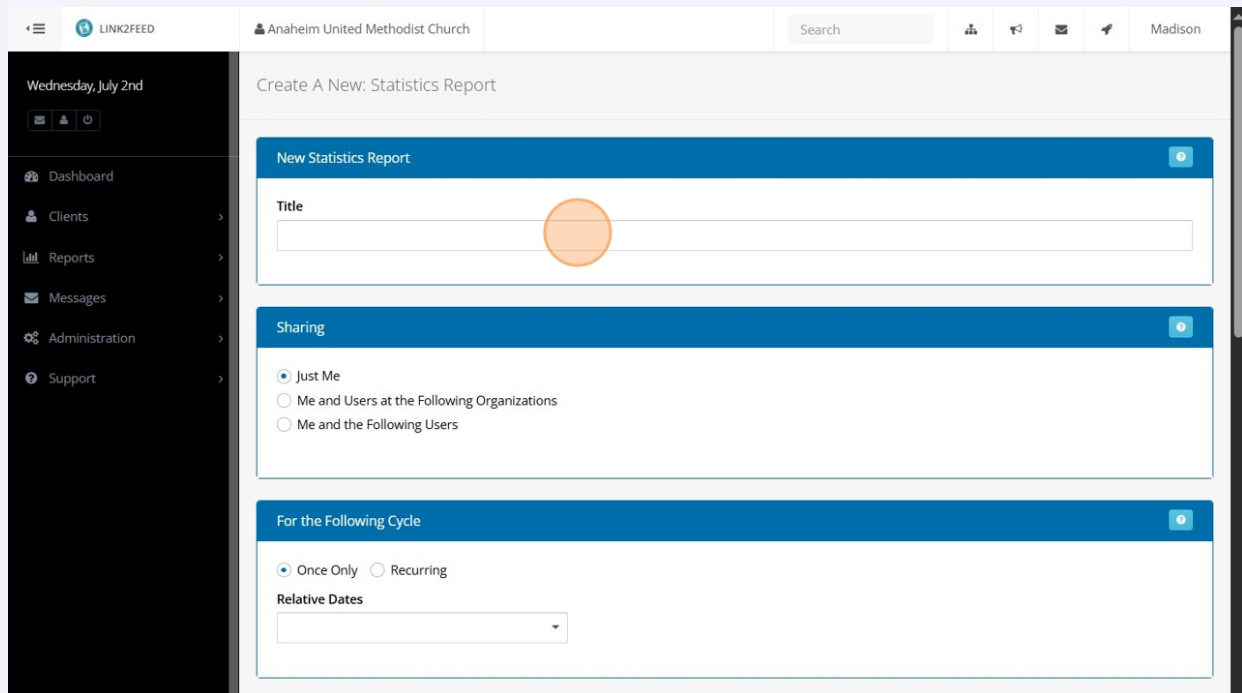
5

Click "Create New Report" under the Statistics Report



6

You can title this report whatever you'd like to - Example: Monthly Stats Report



7

You can click 'Just Me' and have the report sent to just your own Report Inbox - or you can choose 'Me and the Following Users' and select other users at your organization for this report to show in their report inbox as well.

The screenshot shows the LINK2FEED interface for the Anaheim United Methodist Church. The left sidebar contains navigation links: Dashboard, Clients, Reports, Messages, Administration, and Support. The main content area has three sections: 'Sharing', 'For the Following Cycle', and 'Organizations'. In the 'Sharing' section, the 'Just Me' radio button is selected and highlighted with an orange circle. The 'For the Following Cycle' section has 'Once Only' selected. The 'Organizations' section has 'By Name' selected and a 'Show Inactive' toggle set to 'OFF'.

8

For the Following Cycle - to run this report once, you can select under 'Relative Dates' and then 'What I Choose'

This screenshot shows the same LINK2FEED interface, but with the 'Relative Dates' dropdown menu open in the 'For the Following Cycle' section. The 'What I Choose' option is highlighted with an orange circle. The dropdown menu lists 'Relative dates in the past' with options: Yesterday, Last Week, Last Month, Last Quarter, and Last 6 Months. The 'Organizations' section remains the same as in the previous screenshot.

9

Select the Custom Date Range - For example: If choosing the previous month, select June 1 - June 30.

Wednesday, July 2nd

LINK2FEED Anaheim United Methodist Church Search Madison

Sharing

- ☒ Just Me
- ☐ Me and Users at the Following Organizations
- ☐ Me and the Following Users

For the Following Cycle

☒ Once Only ☐ Recurring

Relative Dates: What I Choose Custom Date Range: 2025-06-01 and 2025-07-02

Organizations

☒ By Name ☐ By County ☐ By City

Select Organizations By Name

☒ One Row Per Organization ☐ One Row Total

Additional Options

10

You could also choose to make this a Recurring report.

Wednesday, July 2nd

LINK2FEED Anaheim United Methodist Church Search Madison

Sharing

- ☒ Just Me
- ☐ Me and Users at the Following Organizations
- ☐ Me and the Following Users

For the Following Cycle

☐ Once Only ☒ Recurring

Recurring: Daily Relative Dates: Starting On: 2025-07-02

Organizations

☒ By Name ☐ By County ☐ By City

Select Organizations By Name

☒ One Row Per Organization ☐ One Row Total

Additional Options

☐ Include anonymous visits

11

For example - if you'd like to have this report populate every months, you can select 'Monthly'

The screenshot shows the 'Sharing' and 'For the Following Cycle' sections of a report configuration interface. In the 'For the Following Cycle' section, the 'Recurring' dropdown menu is open, and 'Monthly' is selected. The 'Once Only' and 'Recurring' radio buttons are visible, with 'Recurring' being selected. The 'Relative Dates' dropdown is also open, showing options like 'Yesterday', 'Last Week', 'Last Month', 'Last Quarter', 'Last 6 Months', and 'Last Year'. The 'Starting On' date is set to '2025-07-02'. The 'Additional Options' section at the bottom has a checkbox for 'Include anonymous visits' which is currently unchecked.

12

Click "Last Month" and then this report will be in your Report Inbox at the beginning of each month (or whichever date cadence you would like).

The screenshot shows the 'For the Following Cycle' section of the report configuration interface. The 'Recurring' dropdown is set to 'Monthly'. The 'Relative Dates' dropdown menu is open, and 'Last Month' is selected. The 'Once Only' and 'Recurring' radio buttons are visible, with 'Recurring' being selected. The 'Starting On' date is set to '2025-07-02'. The 'Additional Options' section at the bottom has a checkbox for 'Include anonymous visits' which is currently unchecked.

13 Under Organizations - you will select your Organization

Wednesday, July 2nd

LINK2FEED Anaheim United Methodist Church Search Madison

For the Following Cycle

☒ Once Only ☐ Recurring

Relative Dates: What I Choose Custom Date Range: 2025-06-01 and 2025-06-30

Organizations Select All De-select All

☒ By Name ☐ By County ☐ By City Show Inactive OFF

Select Organizations By Name

☒ One Row Per Organization ☐ One Row Total

Additional Options

☐ Include anonymous visits

Program Types Select All De-select All

☐ SNAP ☐ Pantry ☐ School Pantry ☐ TEFAP

14 Click "Include anonymous visits" for most accurate count

Wednesday, July 2nd

LINK2FEED Anaheim United Methodist Church Search Madison

For the Following Cycle

☒ Once Only ☐ Recurring

Relative Dates: What I Choose Custom Date Range: 2025-06-01 and 2025-06-30

Organizations Select All De-select All

☒ By Name ☐ By County ☐ By City Show Inactive OFF

Anaheim United Methodist Church

☒ One Row Per Organization ☐ One Row Total

Additional Options

☐ Include anonymous visits

Program Types Select All De-select All

☐ SNAP ☐ Pantry ☐ School Pantry ☐ TEFAP

Sections Select All Client Household Visit De-select All

☐ Age Group ☐ City

15

Select whichever Program your organization is categorized under or you are wanting to pull from.

The screenshot shows the LINK2FEED interface for the Anaheim United Methodist Church. The left sidebar contains navigation links: Dashboard, Clients, Reports, Messages, Administration, and Support. The main content area has a header with a search bar and user name 'Madison'. Below the header, there are two radio buttons: 'One Row Per Organization' (selected) and 'One Row Total'. The 'Additional Options' section has a checked checkbox for 'Include anonymous visits'. The 'Program Types' section has four checkboxes: 'SNAP', 'Pantry' (circled in orange), 'School Pantry', and 'TEFAP'. The 'Sections' section has a 'Select All' button and a list of checkboxes for various demographic and service-related categories.

Wednesday, July 2nd

LINK2FEED

Anaheim United Methodist Church

Search

Madison

One Row Per Organization One Row Total

Additional Options

☒ Include anonymous visits

Program Types

☐ SNAP ☒ Pantry ☐ School Pantry ☐ TEFAP

Sections

☒ Select All ☐ Client ☐ Household ☐ Visit ☐ De-select All

- ☐ Age Group
- ☐ City
- ☐ Country of Birth
- ☐ County
- ☐ Ethnicity
- ☐ Dietary Considerations
- ☐ Disability
- ☐ Education (Country)
- ☐ Education (Highest)
- ☐ Employment
- ☐ Expenses
- ☐ Gender Identity
- ☐ Household Social Programs

16

Now when you scroll down you will see all of the options to choose from on your report. To view the Stats (households/individuals served) - you will select 'Served'.

The screenshot shows the LINK2FEED interface with the 'Sections' list expanded. The 'Served' checkbox is circled in orange. At the bottom right, there are three buttons: 'Cancel', 'Save Template', and 'Create Report'. A small circular icon with a plus sign is also visible in the bottom right corner.

Dashboard

Clients

Reports

Messages

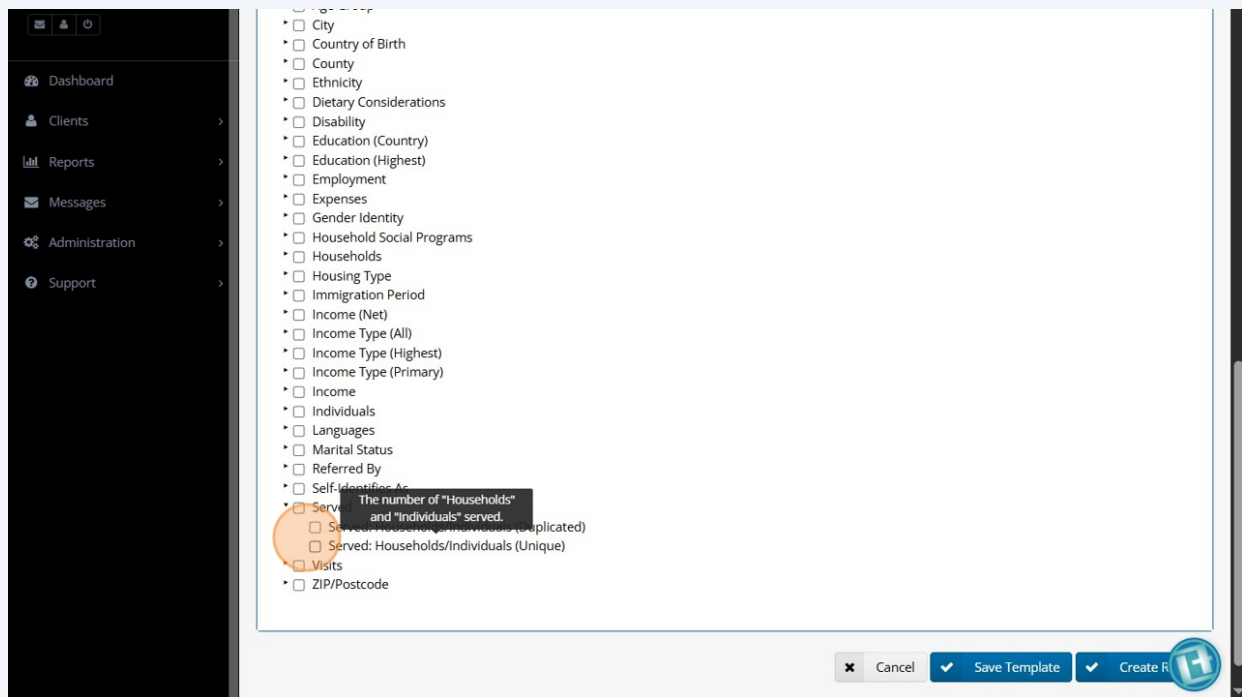
Administration

Support

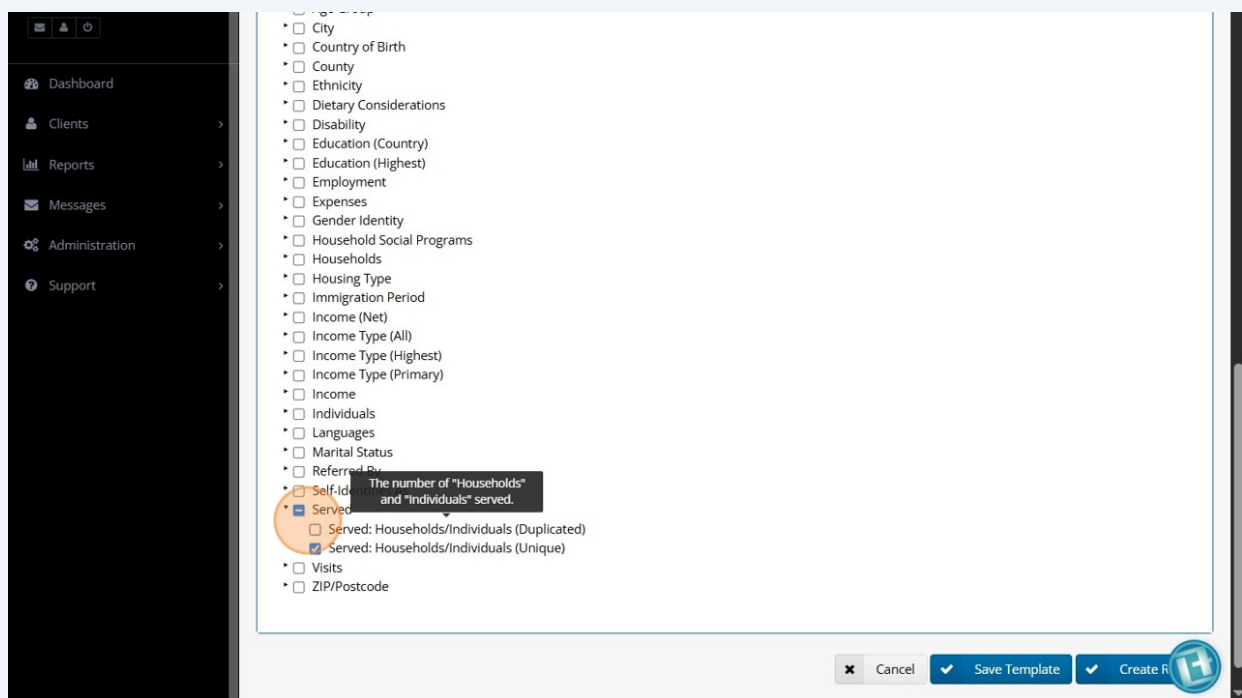
- ☐ Age Group
- ☐ City
- ☐ Country of Birth
- ☐ County
- ☐ Ethnicity
- ☐ Dietary Considerations
- ☐ Disability
- ☐ Education (Country)
- ☐ Education (Highest)
- ☐ Employment
- ☐ Expenses
- ☐ Gender Identity
- ☐ Household Social Programs
- ☐ Households
- ☐ Housing Type
- ☐ Immigration Period
- ☐ Income (Net)
- ☐ Income Type (All)
- ☐ Income Type (Highest)
- ☐ Income Type (Primary)
- ☐ Income
- ☐ Individuals
- ☐ Languages
- ☐ Marital Status
- ☐ Referred By
- ☐ Self-Identifies As
- ☒ Served
- ☐ Visits
- ☐ ZIP/Postcode

Cancel Save Template Create Report

17 Click the "Served: Households/Individuals (Unique)" field.



18 Click the "Served: Households/Individuals (Duplicated)" field.

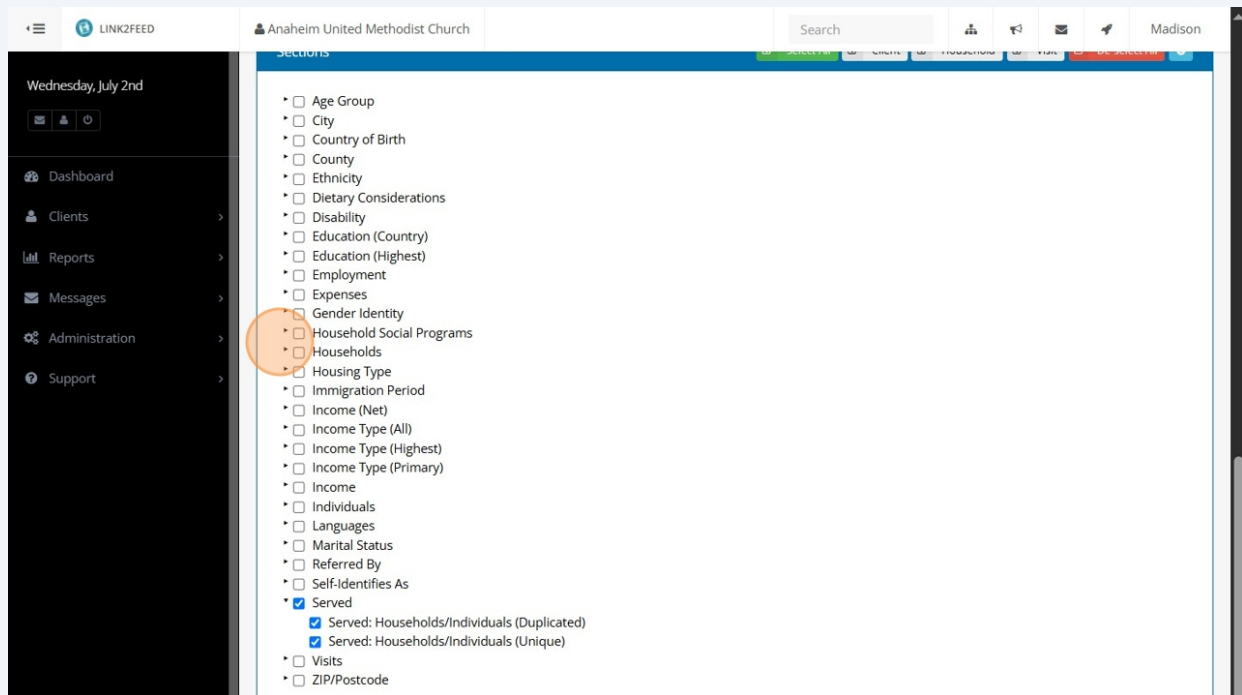




The Unique count will give you the unique households/individuals - but the duplicated will capture households/individuals that have visited more than once within the captured time period.

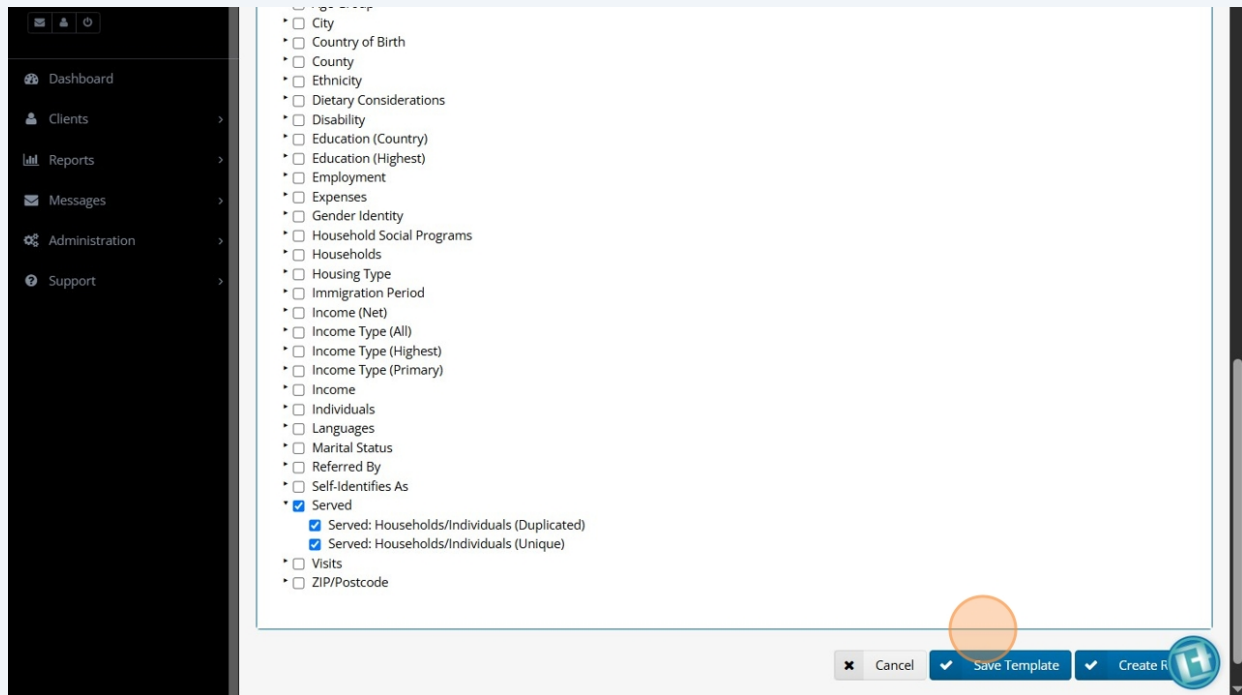
19

There are a ton of other options of things you can pull in this report. I suggest scrolling through and hovering over each option - this will give you an idea of what information you will get if you decide to select any other options.



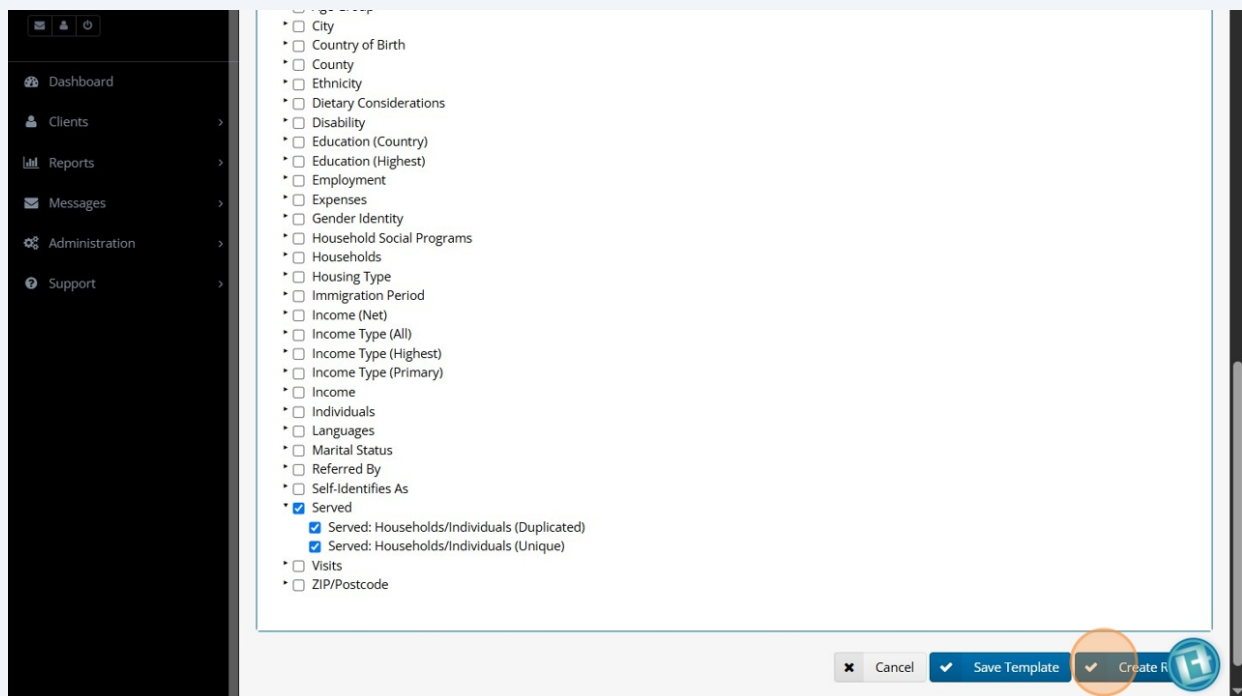
20

You have the option to save this report as a template if you'd like - and then Run the Report from the 'Report Templates' section.



21

Click "Create Report" to run this report.



22

This will then automatically bring you to the 'Report Inbox' and you will see the report you just ran Status with a little blue clock - meaning 'Queued' and not ready to be seen yet.

The screenshot shows the LINK2FEED interface for Anaheim United Methodist Church. The left sidebar contains navigation links: Dashboard, Clients, Reports (selected), New Report, Report Inbox, Report Templates, Recurring Reports, Organization Groups, Data Groups, Messages, Administration, and Support. The main content area is titled 'Your Reports / Your recurring reports'. A green notice box at the top right states: 'Notice! Your report has been successfully queued.' Below this is a table titled 'Your queued and completed reports.' with columns: Title, Requested, Status, and actions. The table lists several reports, with the first one, 'Test Monthly Stats - June', having a status of 'Queued' (indicated by a blue clock icon) and a 'Requested' time of 2025-07-02 @ 01:42 PM. Other reports have a status of 'Completed' (indicated by a green checkmark). The table also includes a 'Per page' dropdown set to 25 and a search bar.

| Title | Requested | Status | Actions |
|---|-----------------------|-----------|-------------------------------|
| Test Monthly Stats - June Statistics Report | 2025-07-02 @ 01:42 PM | Queued | [Refresh] [Download] [Delete] |
| B&GC Test Report Statistics Report With dates between 2025-06-01 and 2025-07-31 | 2025-07-01 @ 12:41 PM | Completed | [Refresh] [Download] [Delete] |
| Test Agency Report Agency Report With dates between 2024-12-01 and 2025-05-31 | 2025-06-27 @ 11:32 AM | Completed | [Refresh] [Download] [Delete] |
| TEST for Loom Statistics Report With dates between 2025-05-01 and 2025-05-31 | 2025-06-27 @ 11:29 AM | Completed | [Refresh] [Download] [Delete] |
| Stats for website - test Client Status Report With dates between 2015-01-01 and 2025-05-06 | 2025-05-06 @ 02:22 PM | Completed | [Refresh] [Download] [Delete] |
| CI Stats For Website Statistics Report With dates between 2015-01-01 and 2025-05-06 | 2025-05-06 @ 01:06 PM | Completed | [Refresh] [Download] [Delete] |
| CI Stats Report Statistics Report With dates between 2024-01-01 and 2024-12-31 | 2025-04-15 @ 11:51 AM | Completed | [Refresh] [Download] [Delete] |



This may take 3-5 minutes to generate.

23 One the report is ready to view - the Status will change to a green checkmark.

The screenshot shows the LINK2FEED interface for Anaheim United Methodist Church. The left sidebar contains navigation links: Dashboard, Clients, Reports (selected), New Report, Report Inbox, Report Templates, Recurring Reports, Organization Groups, Data Groups, Messages, Administration, and Support. The main content area is titled "Your Reports / Your recurring reports" and features a "New Report" button. Below this is a table titled "Your queued and completed reports." with columns for Title, Requested, Status, and actions. The table lists several reports, all of which now have a green checkmark in the Status column, indicating they are ready to view. A red circle highlights the green checkmark in the Status column for the first report, "Test Monthly Stats - June".

| Title | Requested | Status | Actions |
|---|-----------------------|--------|---------------------------|
| Test Monthly Stats - June Statistics Report With dates between 2025-06-01 and 2025-06-30 | 2025-07-02 @ 01:42 PM | ✓ | [View] [Refresh] [Delete] |
| B&GC Test Report Statistics Report With dates between 2025-06-01 and 2025-07-31 | 2025-07-01 @ 12:41 PM | ✓ | [View] [Refresh] [Delete] |
| Test Agency Report Agency Report With dates between 2024-12-01 and 2025-05-31 | 2025-06-27 @ 11:32 AM | ✓ | [View] [Refresh] [Delete] |
| TEST for Loom Statistics Report With dates between 2025-05-01 and 2025-05-31 | 2025-06-27 @ 11:29 AM | ✓ | [View] [Refresh] [Delete] |
| Stats for website - test Client Status Report With dates between 2015-01-01 and 2025-05-06 | 2025-05-06 @ 02:22 PM | ✓ | [View] [Refresh] [Delete] |
| CI Stats For Website Statistics Report With dates between 2015-01-01 and 2025-05-06 | 2025-05-06 @ 01:06 PM | ✓ | [View] [Refresh] [Delete] |
| CI Stats Report Statistics Report | 2025-04-15 @ 11:51 AM | ✓ | [View] [Refresh] [Delete] |

24 You can now click on the report link to open it.

This screenshot is identical to the one above, showing the same LINK2FEED interface with the list of reports. A red circle highlights the title "Test Monthly Stats - June" in the first row of the table, indicating that this link can be clicked to open the report.

| Title | Requested | Status | Actions |
|---|-----------------------|--------|---------------------------|
| Test Monthly Stats - June Statistics Report With dates between 2025-06-01 and 2025-06-30 | 2025-07-02 @ 01:42 PM | ✓ | [View] [Refresh] [Delete] |
| B&GC Test Report Statistics Report With dates between 2025-06-01 and 2025-07-31 | 2025-07-01 @ 12:41 PM | ✓ | [View] [Refresh] [Delete] |
| Test Agency Report Agency Report With dates between 2024-12-01 and 2025-05-31 | 2025-06-27 @ 11:32 AM | ✓ | [View] [Refresh] [Delete] |
| TEST for Loom Statistics Report With dates between 2025-05-01 and 2025-05-31 | 2025-06-27 @ 11:29 AM | ✓ | [View] [Refresh] [Delete] |
| Stats for website - test Client Status Report With dates between 2015-01-01 and 2025-05-06 | 2025-05-06 @ 02:22 PM | ✓ | [View] [Refresh] [Delete] |
| CI Stats For Website Statistics Report With dates between 2015-01-01 and 2025-05-06 | 2025-05-06 @ 01:06 PM | ✓ | [View] [Refresh] [Delete] |
| CI Stats Report Statistics Report | 2025-04-15 @ 11:51 AM | ✓ | [View] [Refresh] [Delete] |

25

You can now see the amount of Unique and Duplicated Households and Individuals served.

With dates between 2025 June 1st and 2025 June 30th
For information on how reports are calculated see the [Report Basics Document](#) and [Report Definitions Document](#)

Served: Households/Individuals (Duplicated) Enable Scrolling Tools

The number of "Households" and "Individuals" served. Per page: 5 Search...

| | Households Served | Individuals Served |
|---------------------------------|-------------------|--------------------|
| Anaheim United Methodist Church | 1120 | 1613 |

Showing 1 to 1 of 1 entries Previous 1 Next

Served: Households/Individuals (Unique) Enable Scrolling Tools

The number of "Households" and "Individuals" served. Per page: 5 Search...

| | Households Served | Individuals Served |
|---------------------------------|-------------------|--------------------|
| Anaheim United Methodist Church | 728 | 1080 |

Showing 1 to 1 of 1 entries Previous 1 Next

26

In the top right corner, you can select 'Print View' or export the numbers to Excel if needed.

LINK2FEED Anaheim United Methodist Church Search Madison

Wednesday, July 2nd

Test Monthly Stats - June Print View Excel

Reporting for: Anaheim United Methodist Church
For these program types: Pantry
With dates between 2025 June 1st and 2025 June 30th
For information on how reports are calculated see the [Report Basics Document](#) and [Report Definitions Document](#)

Served: Households/Individuals (Duplicated) Enable Scrolling Tools

The number of "Households" and "Individuals" served. Per page: 5 Search...

| | Households Served | Individuals Served |
|---------------------------------|-------------------|--------------------|
| Anaheim United Methodist Church | 1120 | 1613 |

Showing 1 to 1 of 1 entries Previous 1 Next

Served: Households/Individuals (Unique) Enable Scrolling Tools

The number of "Households" and "Individuals" served. Per page: 5 Search...

| | Households Served | Individuals Served |
|---------------------------------|-------------------|--------------------|
| Anaheim United Methodist Church | 728 | 1080 |

27 Click "Report Inbox" anytime to see your previously run reports.

Wednesday, July 2nd

LINK2FEED

Anaheim United Methodist Church

Search

Madison

Test Monthly Stats - June

Reporting for: Anaheim United Methodist Church
For these program types: Pantry
With dates between 2025 June 1st and 2025 June 30th
For information on how reports are calculated see the [Report Basics Document](#) and [Report Definitions Document](#)

Print View XLSX

Served: Households/Individuals (Duplicated)

Enable Scrolling Tools

The number of "Households" and "Individuals" served. Per page: 5 Search...

| | Households Served | Individuals Served |
|---------------------------------|-------------------|--------------------|
| Anaheim United Methodist Church | 1120 | 1613 |

Showing 1 to 1 of 1 entries

Previous 1 Next

Served: Households/Individuals (Unique)

Enable Scrolling Tools

The number of "Households" and "Individuals" served. Per page: 5 Search...

| | Households Served | Individuals Served |
|---------------------------------|-------------------|--------------------|
| Anaheim United Methodist Church | 728 | 1080 |