

Adding Custom Dashlets

Last Modified on 03/03/2023 2:53 pm EST

Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

The DMS has [Standard Dashlets](#) that you can choose to display in your main Dashboard. But you can also add new Dashlets from your previously-made reports.

This article will cover how you can build completely Custom Dashlets to suit your needs.

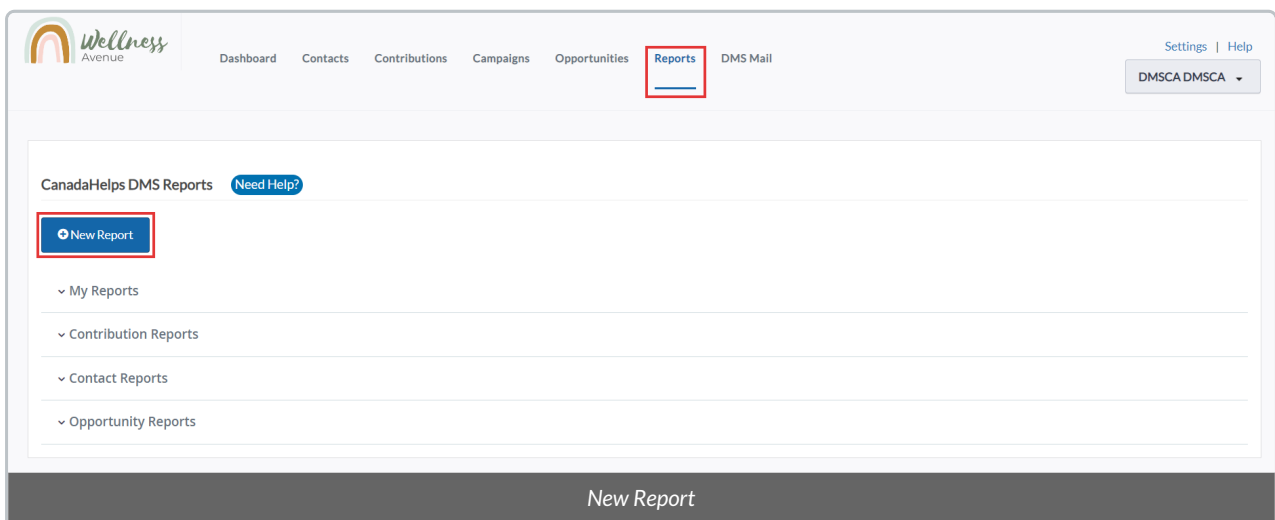
Table of Contents:

- [Adding Custom Dashlets](#)

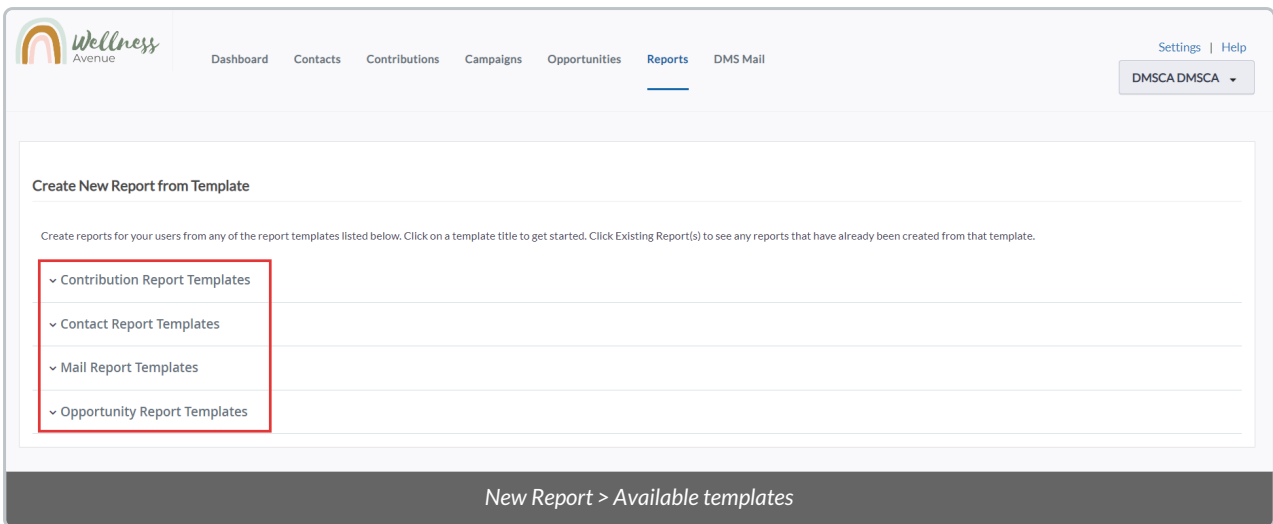
Adding Custom Dashlets

You will be able to add a new Dashlet while adding a **New Report**.

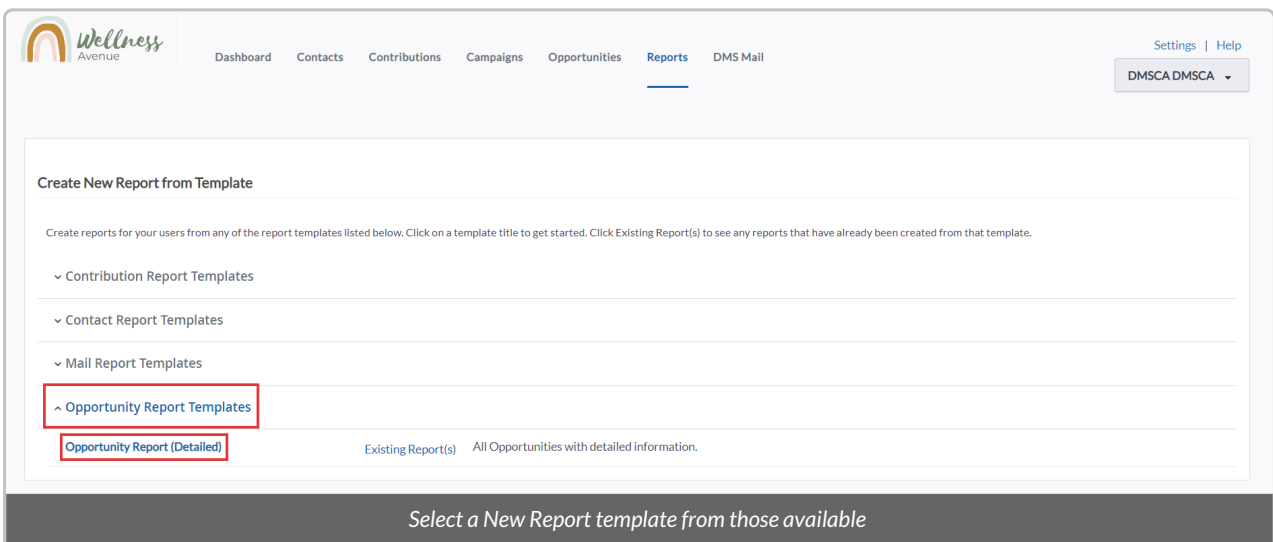
1. Visit the **Reports Tab** and select **New Report**



2. On the next page, you will see a list of **Report Templates** organized by *Contribution, Contact, Mail, and Opportunity*



3. Select a Report Template section to expand all of the Report Templates within it, then select the name of the Report Template you want to build your New Report from



4. Next, you can customize your New Dashlet with Columns, Sorting, and Filters. After customizing your New Dashlet, select **View Results**

Wellness Avenue

Dashboard Contacts Contributions Campaigns **Opportunities** Reports DMS Mail

Settings | Help

DMSCA DMSCA

Opportunity Report (Detailed) - Template

Columns Sorting Filters

Prospect
 Contact ID
 Email
 Opportunity Type
 Application Deadline

Contact Type
 Phone
 Opportunity Status
 Report Due

Contact Sub Type
 Opportunity Amount
 Decision Date

Do Not Trade
 Amount Received

v Opportunities
 v Opportunities

View results

Customize your Dashlet report

5. After loading your results, from the **Actions** menu, select **Create Report**

Wellness Avenue

Dashboard Contacts Contributions Campaigns **Opportunities** Reports DMS Mail

Settings | Help

DMSCA DMSCA

Opportunity Report (Detailed) - Template

Columns Sorting Filters Title and Format Access

Refresh results

+ Add Contacts to Group

Actions
 Create Report
 Save a Copy
 Print Report
 Export as CSV

	Opportunity Type	Opportunity Amount	Application Deadline
	Donation	\$5,000.00	December 1st, 2022
A. L. Kostenko	Gifts In Kind	\$250.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022
Accessibility Foundation	Grant	\$50,000.00	

Create your New Report

6. Creating your Report will then reveal a new **Access** tab. Here, check **Available for Dashboard?**

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | **Reports** | DMS Mail | Settings | Help | DMSCA DMSCA

Opportunities to Track

Columns | Sorting | Filters | Title and Format | **Access**

Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be visible by you.

Available for Dashboard? Users with appropriate permissions can add this report to their dashboard.

Limit Dashboard Results: 10 rows

Cache dashlet for: 60 minutes

Refresh results

Actions | + Add Contacts to Group

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Amadu A	Donation	\$5,000.00	December 1st, 2022
A. L. Kostenko	Gifts In Kind	\$250.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022

Make available for Dashboard

7. Afterwards, select **Actions** and then **Save**.

8. Your saved Report will now be available on your Dashboard as a new Dashlet

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

CanadaHelps DMS Home

2 Available Dashlets

Opportunities to Track

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Amadu A	Donation	\$5,000.00	December 1st, 2022
A. L. Kostenko	Gifts In Kind	\$250.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022
Accessibility Foundation	Grant	\$50,000.00	
Accessibility Foundation	Pledge	\$10,000.00	
Alex Fergie	Grant	\$15,000.00	September 1st, 2022
Alex Fergie	Gifts In Kind	\$25,000.00	
Ada Anderson	Grant	\$5,000.00	September 12th, 2022
Bernadette Love	Grant	\$5,000.00	January 28th, 2022
Digital Angela	Other	\$2,500.00	

New Email Replies

Contact Name	Contact Email	Activity Type	Subject	Date Received
Peppiatt Laura	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM
A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: [CanadaHelps Mail Draft] LAST CHANCE! Angela, double your impact	Dec 6th, 2022 11:48 AM
Omman Jubin	jubino@canadahelps.org	Inbound Email	Re: Thank you	Mar 1st, 2023 12:23 PM

Fiscal Year to Date

Monthly Contribution Summary

Jan of 2023
Feb of 2023
Mar of 2023

New Dashlet

