Adding Custom Dashlets

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Donor Management System

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The DMS has Standard Dashlets that you can choose to display in your main Dashboard. But you can also add new Dashlets from your previsouly-made reports.

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

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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

Avenue Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail	Settings Help DMSCA DMSCA +
CanadaHelps DMS Reports (Need Help?)	
∽ My Reports	
~ Contribution Reports	
✓ Contact Reports	
~ Opportunity Reports	
New Report	

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

Welliness Avenue Dashboard	Contacts Contributions	Campaigns Opportunities	Reports DMS Mail	DN	Settings Help
Create New Report from Template					
Create reports for your users from any of the rep Contribution Report Templates 	ort templates listed below. Click on	a template title to get started. Click E	xisting Report(s) to see any reports that have al	eady been created from that template.	
∽ Contact Report Templates					
~ Mail Report Templates					
~ Opportunity Report Templates					
		New Report > A	vailable templates		

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

Wellness Avenue	Dashboard	Contacts	Contributions	Campaigns	Opportunities	Reports	DMS Mail		Settings Help DMSCA DMSCA +
Create New Report fro	om Template								
Create reports for your user		ort templates lis	ted below. Click on a	template title to	get started. Click Exi	sting Report(s)	to see any reports that have already been cr	eated from that template.	
~ Contact Report Ter	nplates								
 Mail Report Templa Opportunity Report 									
Opportunity Report (I	Detailed)		Existing Report(s) All Opportu	inities with detailed	information.			
			Selec	t a New I	Report tem	plate fr	om those available		

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

Wellness Avenue Dashboard	l Contacts Contributions Campaigns O	oportunities Reports DMS Mail		Settings H
oportunity Report (Detailed) - Temp	lata			
Columns Sorting Filters	nate			
Prospect	Contact Type	Contact Sub Type	Do Not Trade	
Contact ID				
Email	Phone			
Opportunity Type	Opportunity Status	Opportunity Amount	Amount Received	
Application Deadline	Report Due	Decision Date		
~ Opportunities				
~ Opportunities				
View results				

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

Wellness Avenue Dashboard Cor	tacts Contributions	Campaigns Opportunities Rep	orts DMS Mail		Settings
					DMSCA DMSCA
oportunity Report (Detailed) - Template					
Columns Sorting Filters Title	and Format Access	5			
Refresh results					
©Actions				+ Add Contacts to Group	~
O Actions]			+ Add Contacts to Group	Ŧ
Create Report Save a Copy		Opportunity Type	Opportunity Amount		
Create Report		Opportunity Type Donation	Opportunity Amount \$5,000.00	Application Deadline	
Create Report Save a Copy Print Report				Application Deadline	v
Create Report Save a Copy Print Report Export as CSV		Donation	\$5,000.00	Application Deadline December 1st, 2022	· · · · · · · · · · · · · · · · · · ·

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

Avenue Dashboard Contacts Contributions	Campaigns Opportunities Rep	orts 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 appea Available for Dashboard? Users with appropriate permission Limit Dashboard Results Cache dashlet for 60 minutes Refresh results	r in the My Reports section of the reports li ns can add this report to their dashboard.	sting page and will only be visible by you.		
⊘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

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🕀 2 Available Das	hlets							
C 2 C	 Oppor 	tunities to Track	k 🗙	C 2 2			 New Email Replies 	×
Prospect	Opportunity Type	Opportunity Amount		Contact Name	Contact Email	Activity Type	Subject	Date Received
Amadu A	Donation	\$5,000.00	December 1st, 2022	Peppiatt Laura	chelps_test@outlook.com	Inbound Email	Re: Bulk Email Test	Nov 25th, 2022 9:42 AM
A. L. Kostenko	Gifts In Kind	\$250.00		A. L. Kostenko	angelakostenko88@gmail.com	Inbound Email	Re: [CanadaHelps Mail Draft] LAST CHANCE! Angela, double your impact	Dec 6th, 2022 11:48 AM
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022	Omman Jubin	jubino@canadahelps.org	Inbound Email	Re: Thank you	Mar 1st, 2023 12:23 PM
Accessibility Foundation	Grant	\$50,000.00		C 2 0				
Accessibility Foundation	Pledge	\$10,000.00		6.00			 Fiscal Year to Date 	×
Alex Fergie	Grant	\$15,000.00	September 1st, 2022	Jan of 2	023	Cont	ribution Summary	
Alex Fergie	Gifts In Kind	\$25,000.00		Feb of 2 Mar of 2				
Ada Anderson	Grant	\$5,000.00	September 12th, 2022					
Bernadette Love	Grant	\$5,000.00	January 28th, 2022					
Digital Angela	Other	\$2,500.00						