

Filtering Reports

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Donor Management System

Once you have opened a Report, it can be filtered by a variety of fields to narrow its focus.

After you have all of your desired Filters in place, you can also export the data in these Reports.

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Filtering Reports

1. Visit the **Reports Tab**

2. On the next page, you will see a list of our **Standard Reports**, organized by the following sections:

- [Contribution Reports](#)
- [Contact Reports](#)
- [Opportunity Reports](#)

3. **Select the Report Section** to view the expanded list of Report options

The screenshot displays the 'Reports' section of the Donor Management System. The navigation bar at the top includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports' (highlighted with a red box), and 'DMS Mail'. A 'Settings | Help' dropdown menu is visible in the top right corner, showing 'DMSCA DMSCA'. The main content area is titled 'CanadaHelps DMS Reports' and includes a 'Need Help?' button. A 'New Report' button is located at the top left of the report list. The report list is organized into sections: 'My Reports', 'Contribution Reports' (highlighted with a red box), 'Contribution History by Campaign', 'Contribution History by Fund', 'Contribution History by GL Account', and 'Custom Contribution Reports'. Below these sections, there are three report options: 'Contribution History by Source (Summary)' with a description 'Total amounts raised by Source' and 'View Results More' link; 'Recurring Contributions (Summary)' with a description 'Total amounts raised by Recurring Contributions with individual Contribution information' and 'View Results More' link; and 'Receipts' with a description 'Contributions by Receipt Number' and 'View Results More' link. A blue question mark icon is present in the bottom right corner of the report list area. At the bottom of the screenshot, a dark grey banner contains the text 'Expand a Reports section'.

4. Select the name of the Report you want to view to access its Report Details page

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

CanadaHelps DMS Reports [Need Help?](#)

[New Report](#)

My Reports

Contribution Reports

Contribution History by Campaign

Contribution History by Campaign (Summary)	Total amounts raised by Campaign	View Results More
Contribution History by Campaign (Detailed)	Total amounts raised by Campaign with individual Contribution information	View Results More
Contribution History by Campaign (Monthly)	Total amounts raised by Campaign month over month	View Results More
Contribution History by Campaign (Yearly)	Total amounts raised by Campaign year over year	View Results More

Contribution History by Fund

Contribution History by CL Account

Select a Report name

5. Select the **Filters tab** on the top left.

Note: the list of Filters will vary between the type of Report you are running (e.g. Summary Reports will have fewer available filters than Detailed Reports)

Contribution History by Campaign (Summary)

Columns	Filters
Date Received	Any ▾
Receipt Date	Any ▾
Contribution Status	Is one of ▾ Completed ▾
Campaign	Is one of ▾ -select- ▾
Fund	Is one of ▾ -select- ▾
Contribution Recurring	Is equal to ▾ Any ▾
Contribution Amount	Is less than or equal to ▾ <input type="text"/>
Non-deductible Amount	Is less than or equal to ▾ <input type="text"/>
Contribution Aggregate	Is less than or equal to ▾ <input type="text"/>
Contribution Count	Is less than or equal to ▾ <input type="text"/>

Filters tab

Common Report Filters include:

Date Received: the date range in which Contributions were received.

Contribution Amount: the individual amount of the Contributions received.

Source: if the Contribution originated from CanadaHelps or through other sources like manual data entry or historic imports.

Campaign: include or exclude Contributions associated with one or more Campaigns.

Campaign Group: include or exclude Contributions associated with one or more Campaign Groups.

Fund: include or exclude Contributions associated with one or more Funds.

Tag: include or exclude Contacts with certain Tag(s).

Group: include or exclude Contacts in one or more Groups.

Contribution Status: this filter will default to Completed to ensure you have a view of only Contributions that have been successfully processed. If this filter is removed, it may include Contributions that have been refunded or cancelled.

Contribution Note: search for full or partial Contribution Notes.

Recurring: to filter by Recurring Contributions, select Is equal to from the drop-down list and enter "1" on the text field. To exclude Recurring Contributions, select Is equal to from the drop-down list and enter "1" on the text field.

In Memory/In Honour of: filter if there is or is not a dedication

Total Lifetime Contributions: filter (i.e. greater than or less than) total contribution amount per donor, across all time

Amount of Last/First Contribution: filter (i.e. greater than or less than) amount of most recent/oldest contribution per donor

Date of Last/First Contribution: set a date range of most recent/oldest contribution per donor

Largest Contribution: filter (i.e. greater than or less than) amount of largest donation per donor

Count of Contributions: filter (i.e. greater than or less than) total number of donations contributed per donor

6. To apply filters to a Report, use the **drop-down menus** to the right of the Filter Title and determine how the Filter should be applied (e.g. "Is one of" or "Is not one of")

The screenshot displays the 'Contribution History by Campaign (Summary)' report in the Wellness Avenue system. The 'Filters' tab is active, showing a list of filter categories. The 'Campaign' filter is selected with the parameter 'Is one of', and its dropdown menu is open, showing a list of campaign names. The 'Completed' option is selected in the dropdown. A dark grey banner at the bottom of the filter area contains the text 'Choose your filter parameter and entity'.

7. When all Filters have been selected, select **Refresh Results** or **View Results** (if the Report has already been run) to apply the filters and generate the Filtered Report

Contribution History by Campaign (Summary)

Columns	Filters
Date Received	Any
Receipt Date	Any
Contribution Status	Is one of Completed
Campaign	Is one of 2022 GivingTuesday Campaign Building Expansion Campaign Christmas in July Bottle Drive
Fund	Is one of -select -
Contribution Recurring	Is equal to Any
Contribution Amount	Is less than or equal to
Non-deductible Amount	Is less than or equal to
Contribution Aggregate	Is less than or equal to
Contribution Count	Is less than or equal to
Campaign Group	Is one of -select -
Contribution Source	Is one of -select -
Payment Method	Is one of -select -
Campaign Type	Is one of -select -
CHFund	Is one of -select -
Batch Title	Is one of -select -
Credit Card Type	Is one of -select -
Tag	Is one of -select -
Group	Is one of -select -
Custom Question	
Privacy Email opt-in	

[Refresh results](#)

Apply filters and refresh results

8. Once you have generated the filtered Report:

1. **A summary of the Report and the Filters you have applied** will be presented on top of the Report results,
2. **The results of the Report** will be shown below the Summary. The data populating each column will be identified by a header
3. **A summary of the Report totals** will be displayed in a table at the bottom of the Report

Contribution History by Campaign (Summary)

Columns Filters

Refresh results

Actions

Grouping(s)	Campaign
Contribution Status	Is Completed
Campaign	Is one of 2022 GivingTuesday Campaign, Bottle Drive, Building Expansion Campaign, Christmas in July

Campaign	Number Of Contributions	Total Amount
Bottle Drive	259	\$25,149.16
2022 GivingTuesday Campaign	13	\$3,300.00
Building Expansion Campaign	15	\$4,030.00
Christmas in July	1	\$1,000.00

Row(s) Listed	4
Total Amount	\$ 33,479.16 (288)
Total Contributions	288

Filtered Report results

Note: If the data included in your Report shows more than 50 rows, you can navigate through the multiple pages by selecting the arrows at the bottom right of the screen.