

Filtering Reports

Last Modified on 03/03/2023 12:25 pm EST

Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

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

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

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My Reports

Contribution Reports

- Contribution History by Campaign
- Contribution History by Fund
- Contribution History by GL Account
- Custom Contribution Reports

Contribution History by Source (Summary)	Total amounts raised by Source	View Results More
Recurring Contributions (Summary)	Total amounts raised by Recurring Contributions with individual Contribution information	View Results More
Receipts	Contributions by Receipt Number	View Results More

Expand a Reports section

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

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My Reports

Contribution Reports

- Contribution History by Campaign
- Contribution History by Fund
- Contribution History by GL Account

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

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 shows the 'Wellness Avenue' web application interface. The top navigation bar includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Reports' section is active, and the page title is 'Contribution History by Campaign (Summary)'. Below the title, there are two tabs: 'Columns' and 'Filters'. The 'Filters' tab is selected, displaying a list of filter criteria with dropdown menus for selection. The 'Campaign' filter is highlighted with a red box, and its dropdown menu is open, showing a list of campaign names: 'Bottle Drive', 'Building Expansion Campaign', 'Campaign for test.Celina', 'CanadaHelps Partners', and 'Charity Profile'. The 'Contribution Status' filter is also highlighted with a red box, and its dropdown menu is open, showing 'Completed'. A blue question mark icon is visible in the bottom right corner of the filter area. At the bottom of the page, there is a dark grey bar with 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

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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

1	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	
2	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

3	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.