Filtering Reports

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Donor Management System

Want to learn more about this feature?

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

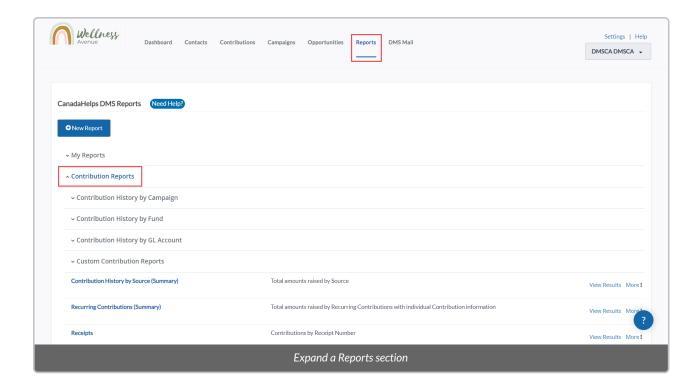
After you have all of your desired Filters in place, you can also export the data in these Reports.

Table of Contents:

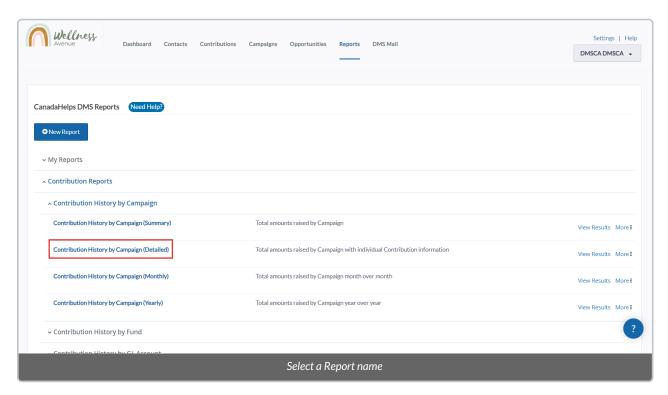
• Filtering Reports

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

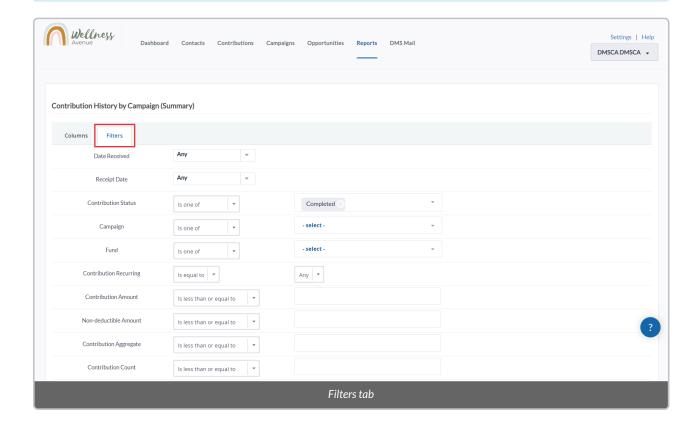


4. Select the name of the Report you want to view to access its Report Details page



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)



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

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

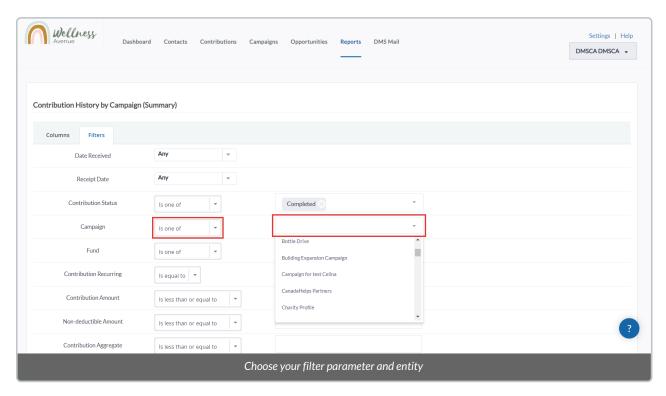
Amount of Last/First Contribution: filter (i.e. greater than or less than) amount of most recent/oldest contribution per donor

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

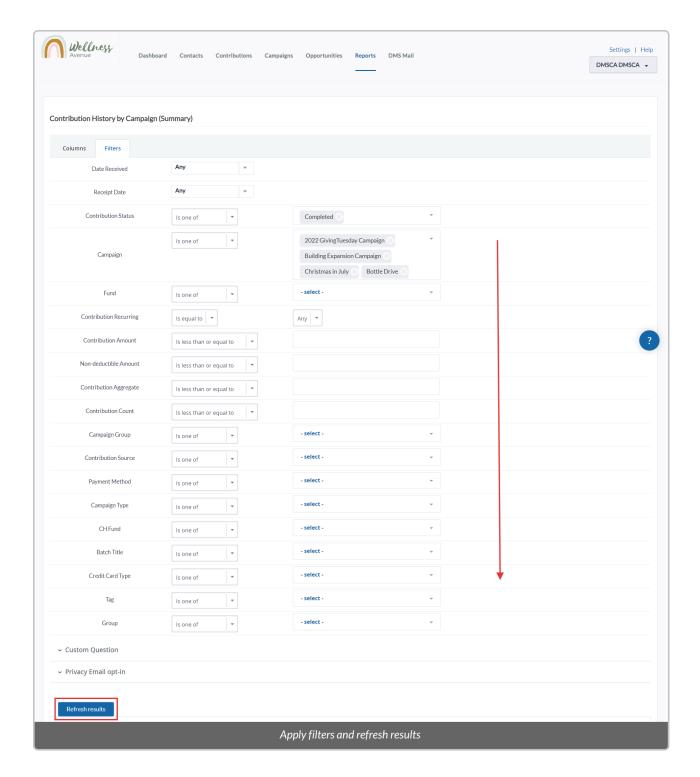
Largest Contribution: filter (i.e. greater than or less than) amount of largest donation per donor

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")

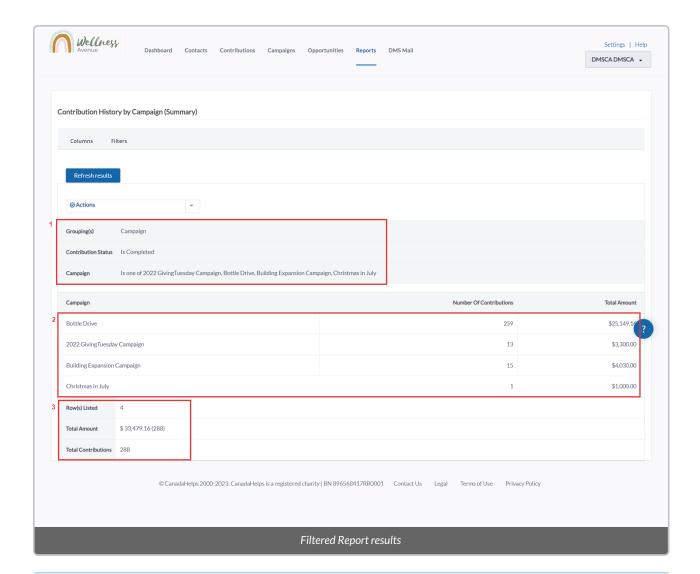


7. When all Filters have been selected, select *Refresh Results* or *View Results* (if the Report has already been run) to apply the filters and generate the Filtered Report



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



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.