Modifying Columns on Reports

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Donor Management System

In addition to filtering Reports, you can also modify the report Columns to obtain even more detailed metrics.

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Which Reports can I add Custom Columns to?

Columns can modified for any report, however, the selection of Columns will vary depending on the report type and the metrics that are being used. Explore the Reports tab to find the report with the columns you need.

The purpose of a **column** is to display additional data in your custom Report, allowing you to see data that otherwise wouldn't have been available in your default Contacts or Contributions tabs.

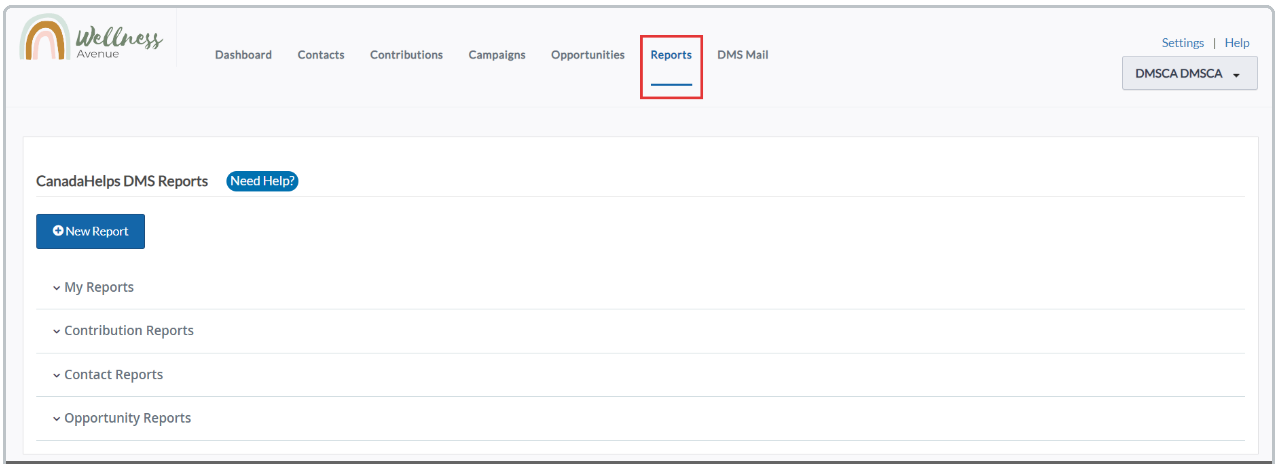
Alternatively, try **Advanced Searching** for Contacts or Contributions to segment the information you need and **export** your Contact or Contribution results to a .csv file.

Adding Custom Columns to Reports

1. Visit the ***Reports Tab.***

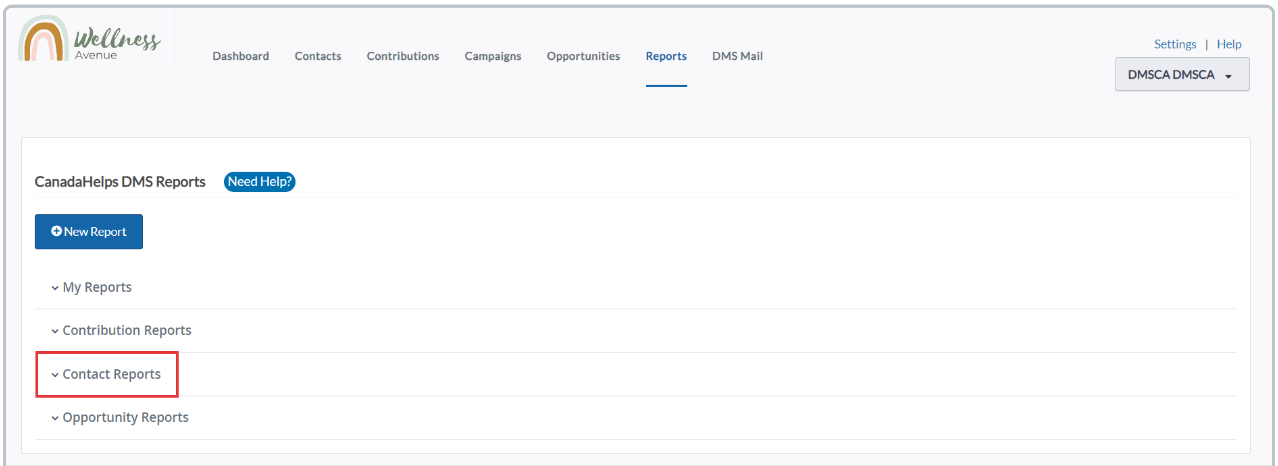
2. On the next page, you will see a list of our Standard Reports, organized by the following sections.

- Contribution Reports
- Contact Reports
- Opportunity Reports
- New Report Button



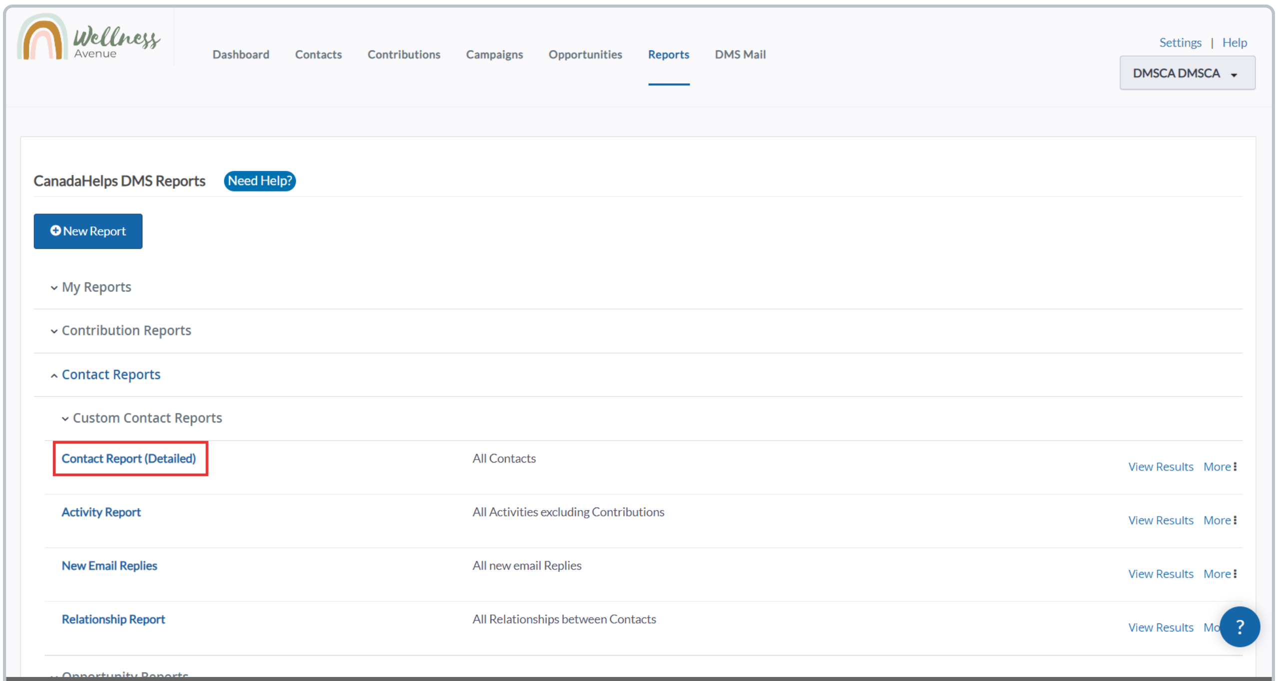
Reports tab

3. **Select the Report Section** to view the expanded list of Report options, or select the blue New Report button to view additional customizable Report templates.



Expand a Reports Heading

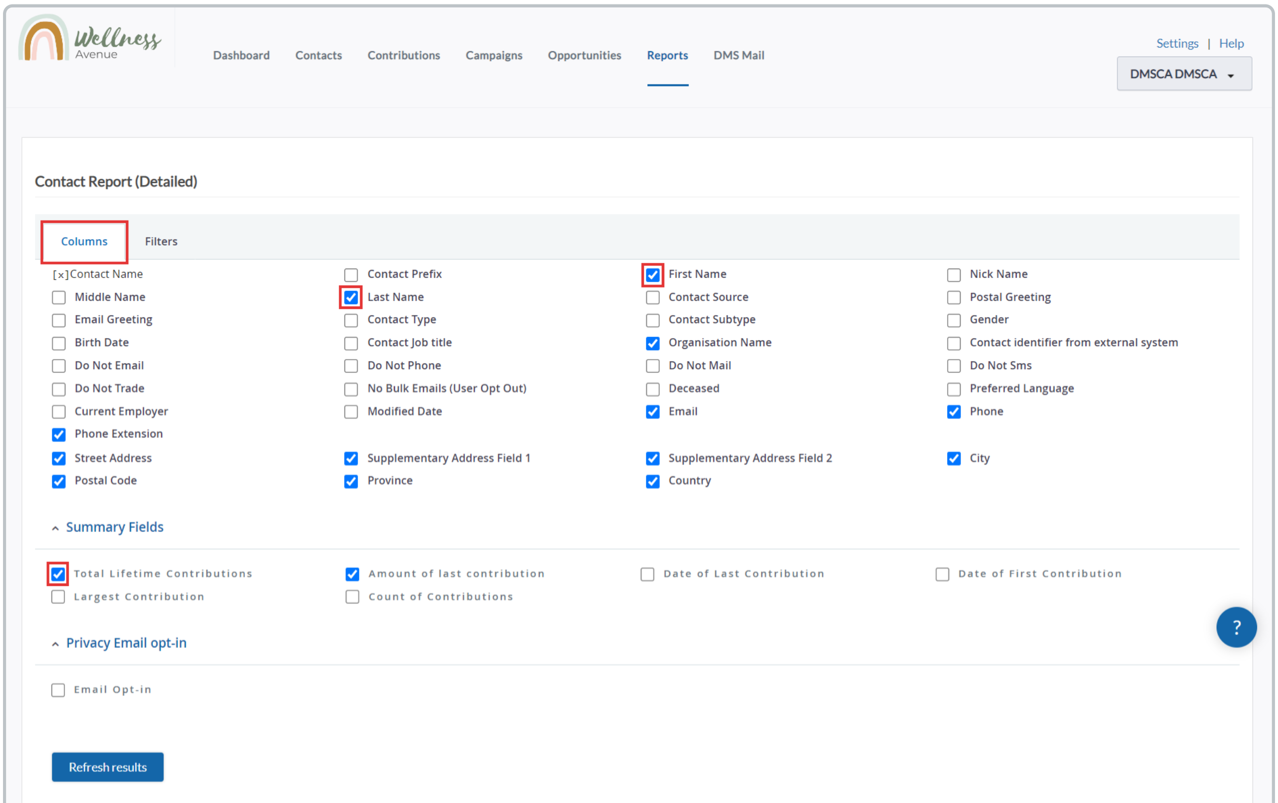
4. **Select one** of the Reports in order to view the available columns.



Select a Report

5. Select the ***Columns*** **tab** on the top left. You will see a**list of available Custom Columns** to choose from. Some Reports also have Custom Columns on expandable sections; click to expand.

> **Note:** Available Columns will vary depending on the Report you are viewing.



Pick and choose your Report columns from those available

6. When your preferred Columns have been ***checked on***, select ***Refresh Results*** at the bottom to see the updated Report.

7. You can also **save and export** these Reports with the selected Custom Columns or **filter** the Reports further.

Highly Customizable Reports

The following Reports are commonly used and have a large number of columns and filters available:

Contribution Reports

Contributions (Detailed)

Repeat Contributions

Contributions for Bookkeeping

Contributions for Bookkeeping (Detailed)

Contact Reports

Contact Report (Detailed)

Activity Report

Activities (Detailed)