# Sorting on Select Reports Last Modified on 03/03/2023 2:31 pm EST

## **Donor Management System** Want to learn more about this feature? Watch our Training Webinars here Sorting allows you to further organize your Reports and is available on a limited number of Reports. Table of Contents: • What is Sorting? • Which Reports can I use Sorting for? • Apply Sorting to Reports

#### What is Sorting?

Sorting allows you to configure some aspects of your reports display, including:

1. Sorting specific **Columns** on your Report in **ascending or descending order**.

• Before:

Avenue Dashboard Contacts Contributions	Campaigns Opportunities Rep	orts DMS Mail	D	Settings   Help MSCA DMSCA +
Opportunity Report (Detailed) - Template				
Columns Sorting Filters Title and Format Access	s			
Column	Ord	er Sec	tion Header / Group By	
Contact Name (in sort format)	As	scending -		
ANOTHER COLUMN Refresh results			+ Add Contacts to Group	
Existing report(s) from this template				
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	
Accessibility Foundation	Grant	\$50,000.00		
Accessibility Foundation	Pledge	\$10,000.00		
Alex Fergie	Gifts In Kind	\$25,000.00		
Alex Fergie	Grant	\$15,000.00	September 1st, 2022	
Ada Anderson	Grant	\$5,000.00	September 12th, 2022	
▼ Bernadette Love	Grant	\$5,000.00	January 28th, 2022	
Digital Angela	Other	\$2,500.00		
Edmonton Fund Grant	Grant	\$15,000.00	May 27th, 2022	
Fred Jones	Donation	\$50,000.00		
Government of British Columbia	Grant	\$25,000.00	December 16th, 2022	
	ort sorted by prospect no	ime in ascending order		

• After:

	rd Contacts Contributions	Campaigns Opportunities Rep	orts DMS Mail	C	Settings   H
pportunity Report (Detailed) - Tem	plate				
Columns Sorting Filters	Title and Format Acces	55 Orr	ler Sor	tion Header / Group By	
Contact Name (in sort format)	•	D	escending -		
ANOTHER COLUMN					
Refresh results					
⊗ Actions	-			+ Add Contacts to Group	~
<ul> <li>Existing report(s) from this template</li> </ul>					
Opportunity Type Is not one of Gifts In	Kind, Donation				
Opportunity Type Is not one of Gifts In	Kind, Donation	Ourselutio Tura	Counter in Amount	And instan Decision	(
Opportunity Type Is not one of Gifts In Prospect	Kind, Donation	Opportunity Type	Opportunity Amount	Application Deadline	(
Opportunity Type Is not one of Gifts In Prospect Tamara Rahmani	Kind, Donation	Opportunity Type Pledge	Opportunity Amount \$5,000.00	Application Deadline June 30th, 2023	(
Opportunity Type     Is not one of Gifts In       Prospect     Is not one of Gifts In       Tamara Rahmani     Is not one of Gifts In       Lucas Allan Froese     Is not one of Gifts In	Kind, Donation	Opportunity Type Pledge Pledge	Opportunity Amount \$5,000.00 \$10,000.00	Application Deadline June 30th, 2023 January 31st, 2025	
Opportunity Type     Is not one of Gifts In       Prospect     Is not one of Gifts In       Tamara Rahmani     Is not one of Gifts In       Lucas Allan Froese     Is not one of Gifts In       Logan CanadaHelps     Is not one of Gifts In	Kind, Donation	Opportunity Type Pledge Pledge Grant	Opportunity Amount \$5,000.00 \$10,000.00 \$10,000.00	Application Deadline June 30th, 2023 January 31st, 2025 May 31st, 2022	(
Opportunity Type     Is not one of Gifts In       Prospect     Is not one of Gifts In       Tamara Rahmani     Is not one of Gifts In       Lucas Allan Froese     Is not one of Gifts In       Logan CanadaHelps     Government of British Columbia	Kind, Donation	Opportunity Type Pledge Pledge Grant Grant	Opportunity Amount \$5,000.00 \$10,000.00 \$10,000.00 \$50,000.00	Application Deadline       June 30th, 2023       January 31st, 2025       May 31st, 2022       March 15th, 2023	
Opportunity Type     Is not one of Gifts In       Prospect     Is not one of Gifts In       Tamara Rahmani     Is not one of Gifts In       Lucas Allan Froese     Is not one of Gifts In       Logan CanadaHelps     Government of British Columbia       Government of British Columbia     Is not one of Gifts In	Kind, Donation	Opportunity Type Pledge Pledge Grant Grant Grant	Opportunity Amount \$5,000.00 \$10,000.00 \$10,000.00 \$50,000.00 \$25,000.00	Application Deadline       June 30th, 2023       January 31st, 2025       May 31st, 2022       March 15th, 2023       December 16th, 2022	
Opportunity Type     Is not one of Gift's In       Prospect     Is not one of Gift's In       Tamara Rahmani     Is not one of Gift's In       Lucas Allan Froese     Is not one of Gift's In       Government of British Columbia     Is not one of Gift's In       Government of British Columbia     Is not one of Gift's In       Edmonton Fund Grant     Is not one of Gift's In	Kind, Donation	Opportunity Type Pledge Pledge Grant Grant Grant Grant Grant Grant Grant Grant	Opportunity Amount           \$5,000.00           \$10,000.00           \$10,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00	Application Deadline           June 30th, 2023           January 31st, 2025           May 31st, 2022           March 15th, 2023           December 16th, 2022           May 27th, 2022	
Opportunity Type     Is not one of Gift's In       Prospect     Is not one of Gift's In       Tamara Rahmani     Is not one of Gift's In       Lucas Allan Froese     Is not one of Gift's In       Logan CanadaHelps     Is not one of Gift's In       Government of Brit'sh Columbia     Is not one of Gift's In       Edmonton Fund Grant     Is not one of Gift's In	Kind, Donation	Opportunity Type Pledge Pledge Grant Grant Grant Grant Other	Opportunity Amount           \$5,000.00           \$10,000.00           \$10,000.00           \$10,000.00           \$25,000.00           \$15,000.00           \$25,000.00           \$25,000.00           \$15,000.00           \$15,000.00           \$15,000.00	Application Deadline       June 30th, 2023       January 31st, 2025       May 31st, 2022       March 15th, 2023       December 16th, 2022       May 27th, 2022	
Opportunity Type       Is not one of Gifts In         Prospect       Is not one of Gifts In         Tamara Rahmani       Is not one of Gifts In         Lucas Allan Froese       Is not one of Gifts In         Logan CanadaHelps       Is not one of British Columbia         Government of British Columbia       Is not one of British Columbia         Edmonton Fund Grant       Is not one of British Columbia         Digital Angela       Is not one of British Columbia	Kind, Donation	Opportunity Type Pledge Pledge Grant Grant Grant Grant Grant Grant Grant Grant	Opportunity Amount           \$5,000,00           \$10,000,00           \$10,000,00           \$25,000,00           \$25,000,00           \$25,000,00           \$25,000,00           \$25,000,00           \$25,000,00           \$25,000,00           \$25,000,00	Application Deadline           June 30th, 2023           January 31st, 2025           May 31st, 2022           March 15th, 2023           December 16th, 2022           May 27th, 2022           January 28th, 2022	
OpportunityType       Is not one of Gifts In         Prospect       Isonot one of Gifts In         Tamara Rahmani       Isonot one of Gifts In         Lucas Allan Froese       Isonot one of Gifts In         Gogan Canada Helps       Isonot one of Gifts In         Government of British Columbia       Isonot one fund Grant         Gigtal Angela       Isonot one fund Grant         Bernadette Love       Isonot one fund Grant	Kind, Donation	Opportunity Type Pledge Pledge Grant Grant Grant Grant Grant Other Grant	Copportunity Amount S5,000,00 \$10,000,00 \$10,000,00 \$55,000,00 \$25,000,00 \$15,000,00 \$2,500,00	Application Deadline June 30th, 2023 January 31st, 2025 May 31st, 2022 March 15th, 2023 December 16th, 2022 May 27th, 2022 January 28th, 2022 Extended 10th 2022	
Opportunity Type       Is not one of Gift's In         Prospect       Is not one of Gift's In         Tamara Rahmani       Is not one of Gift's In         Lucas Allan Froese       Is not one of Gift's In         Logan CanadaHelps       Is not one of Bift's Columbia         Government of Bift's Columbia       Is not one of Bift's Columbia         Government of Bift's Columbia       Is not one of Bift's Columbia         Digital Angela       Is not one of Bift's Columbia         Bernadette Love       Is not one of Bift's Columbia	Kind, Donation	Opportunity Type Pledge Pledge Grant	Opportunity Amount           \$5,000.00           \$10,000.00           \$10,000.00           \$10,000.00           \$10,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$25,000.00           \$55,000.00	Application Deadline           June 30th, 2023           January 31st, 2025           May 31st, 2022           March 15th, 2023           December 16th, 2022           May 27th, 2022           January 28th, 2022           September 12th, 2022	
Opportunity Type       Is not one of Gift's In         Prospect       Is not one of Gift's In         Tamara Rahmani       Is not one of Gift's In         Lucas Allan Froese       Is not one of Gift's In         Gapan CanadaHelps       Is not one of Birtish Columbia         Government of Birtish Columbia       Is not one of Gift's In         Guptan Angela       Is not one of Gift's In         Gigtal Angela       Is not one of Gift's In         Ada Anderson       Is not one of Gift's In         Alex Fergie       Is not one of Gift's In	Kind, Donation	Opportunity Type Pledge Pledge Grant	Copportunity Amount S5,000,00 S10,000,00 S10,000,00 S50,000,00 S25,000,00 S25,000,00 S25,000,00 S55,000,00 S55,000,00 S15,000,00	Application Deadline       June 30th, 2023       January 31st, 2025       May 31st, 2022       March 15th, 2023       December 16th, 2022       May 27th, 2022       January 28th, 2022       September 12th, 2022       September 1st, 2022	

- 2. Placing a specific **Column** on as **a header**.
  - Before:

Welliness Avenue Dashboard Contacts Contributions	Campaigns Opportunities Rep	oorts DMS Mail		Settings   DMSCA DMSCA
pportunity Report (Detailed) - Template				
Columns Sorting Filters Title and Format Acce	\$5			
Column	On	der Sec	ction Header / Group By	
Contact Name (in sort format)	A	scending 🔹	]	
Refreshresults				
Refreshresults         Actions         Existing report(s) from this template         Opportunity Type         Is not one of Gifts In Kind, Donation         Prospect	Opportunity Type	Opportunity Amount	+ Add Contacts to Group Application Deadline	*
Refreshresults         Actions         *         > Existing report(s) from this template         Opportunity Type         Is not one of Gifts In Kind, Donation         Prospect         Accessibility Foundation	Opportunity Type Grant	Opportunity Amount \$50,000.00	+ Add Contacts to Group Application Deadline	*
Refreshresults         Occome         Existing report(s) from this template         Opportunity Type         Is not one of Gifts In Kind, Donation         Prospect         Accessibility Foundation         Accessibility Foundation	Opportunity Type Grant Pledge	Opportunity Amount \$50,000.00 \$10,000.00	+ Add Contacts to Group Application Deadline	~
Refresh results         Actions         Existing report(s) from this template         Opportunity Type       Is not one of Gifts In Kind, Donation         Prospect         Accessibility Foundation         Accessibility Foundation         Accessibility Foundation         Accessibility Foundation	Opportunity Type Grant Pledge Grant	Opportunity Amount \$50,000.00 \$10,000.00 \$250,000.00	Application Deadline December 30th, 2022	
Refreshresults	Opportunity Type Grant Pledge Grant Grant	Opportunity Amount \$50,000.00 \$10,000.00 \$250,000.00 \$15,000.00	Add Contacts to Group  Application Deadline  December 30th, 2022 September 1st, 2022	
Refreshresults	Opportunity Type Grant Pledge Grant Grant Grant	Opportunity Amount           \$50,000.00           \$10,000.00           \$250,000.00           \$15,000.00           \$15,000.00           \$15,000.00           \$55,000.00	Add Contacts to Group  Application Deadline  December 30th, 2022  September 1st, 2022	

• After:

Wellney, Avenue Dashboard Contacts Contributions C	Campaigns Opportunities Reports DMS M	li	Settings DMSCA DMSC
pportunity Report (Detailed) - Template			
Columns Sorting Filters Title and Format Access			
Column	Order	Sec	ction Header / Group By
Opportunity Type	Ascending -		l i i i i i i i i i i i i i i i i i i i
ANOTHER COLUMN			
Refreshresults			
Actions     Fixisting report(s) from this template			+ Add Contacts to Group
Opportunity Type Is not one of Gifts In Kind, Donation			
Opportunity Type: Grant (9)			
Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Bernadette Love	Grant	\$5,000.00	January 28th, 2022
Accessibility Foundation	Grant	\$50,000.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022
Government of British Columbia	Grant	\$25,000.00	December 16th, 2022
Alex Fergie	Grant	\$15,000.00	September 1st, 2022
Ada Anderson	Grant	\$5,000.00	September 12th, 2022
Logan CanadaHelps	Grant	\$10,000.00	May 31st, 2022
Logan CanadaHelps Edmonton Fund Grant	Grant	\$10,000.00 \$15,000.00	May 31st, 2022 May 27th, 2022
Logan CanadaHelps Edmonton Fund Grant Government of British Columbia	Grant Grant Grant	\$10,000.00 \$15,000.00 \$50,000.00	May 31st, 2022 May 27th, 2022 March 15th, 2023
Logan CanadaHelps     Edmonton Fund Grant       Government of British Columbia     Image: Columbia Columbia	Grant Grant Grant	\$10,000.00 \$15,000.00 \$50,000.00	May 31st, 2022 May 27th, 2022 March 15th, 2023
Logan CanadaHelps     Image: Comparison of Comparison of British Columbia       Opportunity Type: Other (1)       Prospect	Grant Grant Grant Opportunity Type	\$10,000.00 \$15,000.00 \$50,000.00 Opportunity Amount	May 31st, 2022 May 27th, 2022 March 15th, 2023 Application Deadline
Logan CanadaHelps     I       Edmonton Fund Grant     I       Government of British Columbia     I <b>Opportunity Type: Other (1)</b> I       Prospect     I       Digital Angela     I	Grant Grant Grant CopportunityType Other	\$10,000,00 \$15,000,00 \$50,000,00 Opportunity Amount \$2,500,00	May 31st, 2022 May 27th, 2022 March 15th, 2023 Application Deadline
Logan CanadaHelps     I       Edmonton Fund Grant     I       Government of British Columbia     I <b>Opportunity Type: Other (1)</b> I       Prospect     I       Digital Angela     I <b>Opportunity Type: Pledge (3)</b> I	Grant Grant Grant Copportunity Type Other	\$10,000,00 \$15,000,00 \$50,000,00 <b>Opportunity Amount</b> \$2,500,00	May 31st, 2022 May 27th, 2022 March 15th, 2023  Application Deadline
Logan Canada Helps       I         Edmonton Fund Grant       I         Government of British Columbia       I <b>Dopportunity Type: Other (1)</b> I         Prospect       I <b>Opportunity Type: Pledge (3)</b> I         Prospect       I         Prospect       I	Grant Grant Grant Copportunity Type Opportunity Type Opportunity Type	\$10,000,00 \$15,000,00 \$50,000,00 Opportunity Amount \$2,500,00 Opportunity Amount	May 31st, 2022         May 27th, 2022         March 15th, 2023         Application Deadline         Application Deadline         Application Deadline
Logan CanadaHelps          Edmonton Fund Grant          Government of British Columbia <b>Dopportunity Typpe: Other (1)</b> Prospect <b>Dopportunity Typpe: Pledge (3)</b> Prospect          Lucas Allan Froese	Grant       Grant       Grant       Opportunity Type       Opportunity Type       Pledge	\$10,000,00 \$15,000,00 \$50,000,00 Opportunity Amount \$2,500,00 Opportunity Amount \$10,000,00	May 31st, 2022         May 27th, 2022         March 15th, 2023         Application Deadline         Application Deadline         Application Deadline         January 31st, 2025

### Which Reports can I use Sorting for?

Grouping & Sorting can only be used on:

- New Reports that have been added through the New Report button, and
- Saved Custom Reports.

#### Apply Sorting to Reports

#### 1. Go to the Reports Tab

2. Select one of your Saved or New Reports that allow for Sorting

3. On the next page, select *Sorting* and apply your *sorting parameters* (as seen in the examples above)

- Column: choose the Column to Group your results by (i.e., the one you'd like to see as section header)
- Order: order by Descending or Ascending order.
- Section Header / Group By: groups the Report results by the selected Column (above)

Avenue Dashboard Contac	ts Contributions Campaigns Opportunities Rep —	ports DMS Mail	S	ettings   Help ADMSCA 🗸
Repeat Donors 2023				
Columns Sorting Filters Title and	4 Format Accore			
Column	Order	Section Header / Group B	7	
Last Name, First Name	Ascending			
	· ·		]	
ANOMERCOLONIN				
Refresh results				
⊘Actions			- Add Contacts to Group	v
Convolution Constant				
Grouping(s) Contact	10 40-00 MA and Catural at 04 December 2020 44-50 DM			?
Initial Date Range Between Satur day 1 January 202	22, 12:00AM and Saturday 31 December 2022, 11:39PM			
Second Date Kange Between Sunday 1 January 2023	, 12:00AM and Sunday 31 December 2023, 11:59PM			
Contribution Status Is Completed				
		1	lage 1 ♣ ← 1-50 of	111 →
Contact Name	January 1st, 2022 - December 31st, 2022	January 1st, 2023 - December 31st, 2023	% Change	
A Amadu	134.00 (4)	40.00 (2)	-70.15	360
A. L. Kostenko	1883.92 (20)	2582.00 (10)	37.05	481
Accessibility Foundation		1150.00 (2)	New Donor	466
Aleph Roger		10.00 (1)	New Donor	432
Alex Fergie	17448.00 (88)	7350.00 (60)	-57.87	399
	Sorting a New/Cus	stom Report		

Note: We recommend Grouping your Report by no more than 2 Columns or 1 Section Header