

Sorting on Select Reports

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Donor Management System

Sorting allows you to further organize your Reports and is available on a limited number of Reports.

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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:**

Opportunity Report (Detailed) - Template

Columns **Sorting** Filters Title and Format Access

Column Order Section Header / Group By

Contact Name (in sort format) Ascending

ANOTHER COLUMN

Refresh results

Actions Existing report(s) from this template + Add Contacts to Group

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

Report sorted by prospect name in ascending order

- After:

Opportunity Report (Detailed) - Template

Columns **Sorting** Filters Title and Format Access

Column	Order	Section Header / Group By
Contact Name (in sort format)	Descending	<input type="checkbox"/>

ANOTHER COLUMN

Refresh results

⊗ Actions

+ Add Contacts to Group

Existing report(s) from this template

Opportunity Type Is not one of Gifts In Kind, Donation



Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Tamara Rahmani	Pledge	\$5,000.00	June 30th, 2023
Lucas Allan Froese	Pledge	\$10,000.00	January 31st, 2025
Logan CanadaHelps	Grant	\$10,000.00	May 31st, 2022
Government of British Columbia	Grant	\$50,000.00	March 15th, 2023
Government of British Columbia	Grant	\$25,000.00	December 16th, 2022
Edmonton Fund Grant	Grant	\$15,000.00	May 27th, 2022
Digital Angela	Other	\$2,500.00	
Bernadette Love	Grant	\$5,000.00	January 28th, 2022
Ada Anderson	Grant	\$5,000.00	September 12th, 2022
Alex Fergie	Grant	\$15,000.00	September 1st, 2022
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022

Report sorted by prospect name in descending order

2. Placing a specific **Column** on as a **header**.

- **Before:**

Opportunity Report (Detailed) - Template

Columns **Sorting** Filters Title and Format Access

Column

Order

Section Header / Group By

Contact Name (in sort format)

Ascending

ANOTHER COLUMN

Refresh results

Actions

Existing report(s) from this template

+ Add Contacts to Group

Opportunity Type Is not one of Gifts In Kind, Donation

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Accessibility Foundation	Grant	\$50,000.00	
Accessibility Foundation	Pledge	\$10,000.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022
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

Report that is not Grouped and without Headers

- **After:**

Opportunity Report (Detailed) - Template

Columns **Sorting** Filters Title and Format Access

Column

Order

Section Header / Group By

Opportunity Type

Ascending

ANOTHER COLUMN

Refresh results

⊙ Actions

> Existing 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
Edmonton Fund Grant	Grant	\$15,000.00	May 27th, 2022
Government of British Columbia	Grant	\$50,000.00	March 15th, 2023

Opportunity Type: Other (1)

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Digital Angela	Other	\$2,500.00	

Opportunity Type: Pledge (3)

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Lucas Allan Froese	Pledge	\$10,000.00	January 31st, 2025
Accessibility Foundation	Pledge	\$10,000.00	

Report Sorted by First Name with corresponding Headers

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)

The screenshot shows the 'Repeat Donors 2023' report interface. The 'Sorting' tab is selected, and the 'Last Name, First Name' column is chosen for sorting in ascending order. Below the sorting options, there are buttons for 'ANOTHER COLUMN' and 'Refresh results'. The report data is displayed in a table with columns for 'Contact Name', 'January 1st, 2022 - December 31st, 2022', 'January 1st, 2023 - December 31st, 2023', and '% Change'. The table includes rows for A Amadu, A. L. Kostenko, Accessibility Foundation, Aleph Roger, and Alex Fergie.

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/Custom Report

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

