Sorting on Select Reports

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Donor Management System

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

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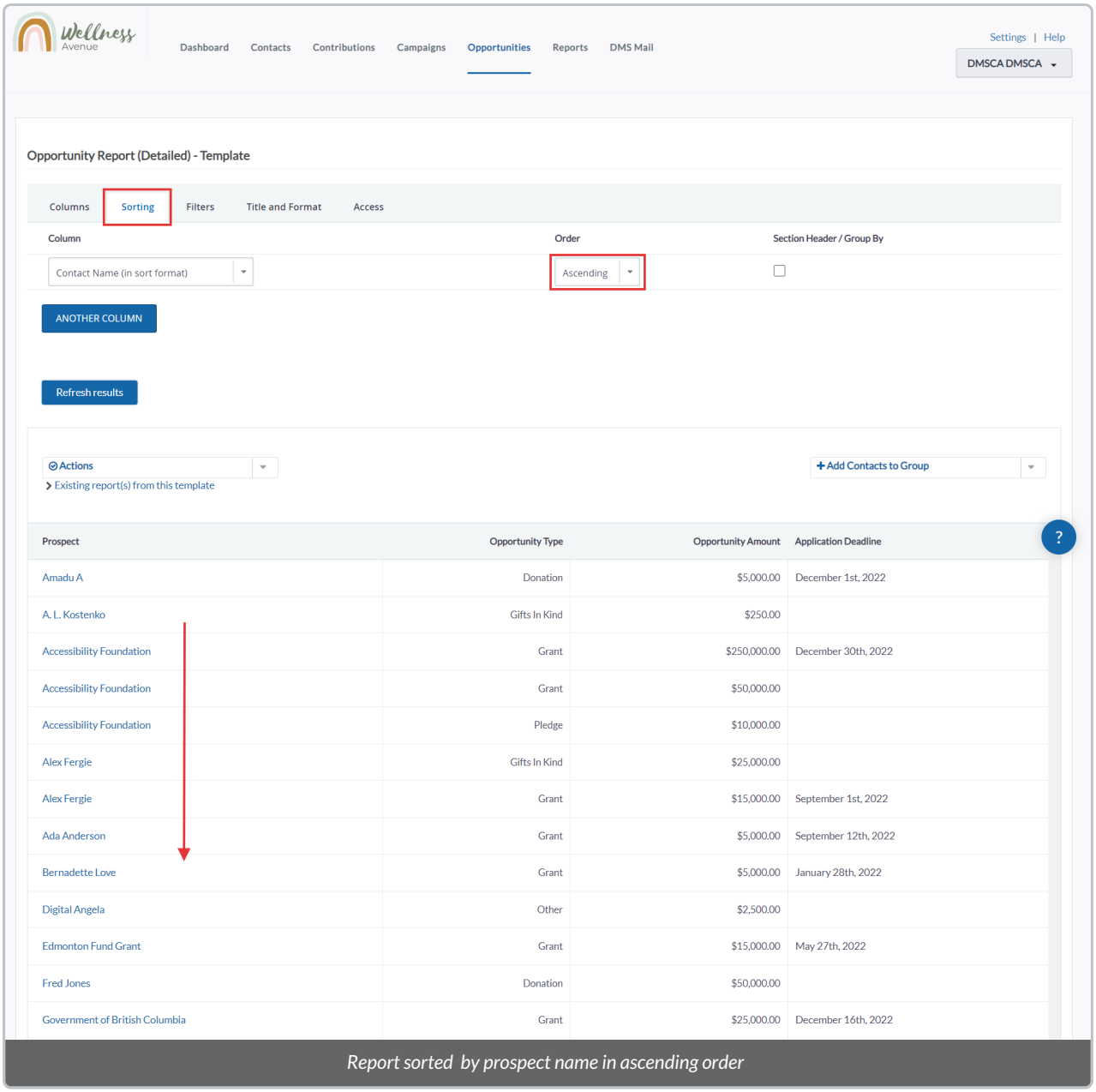
What is Sorting?

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

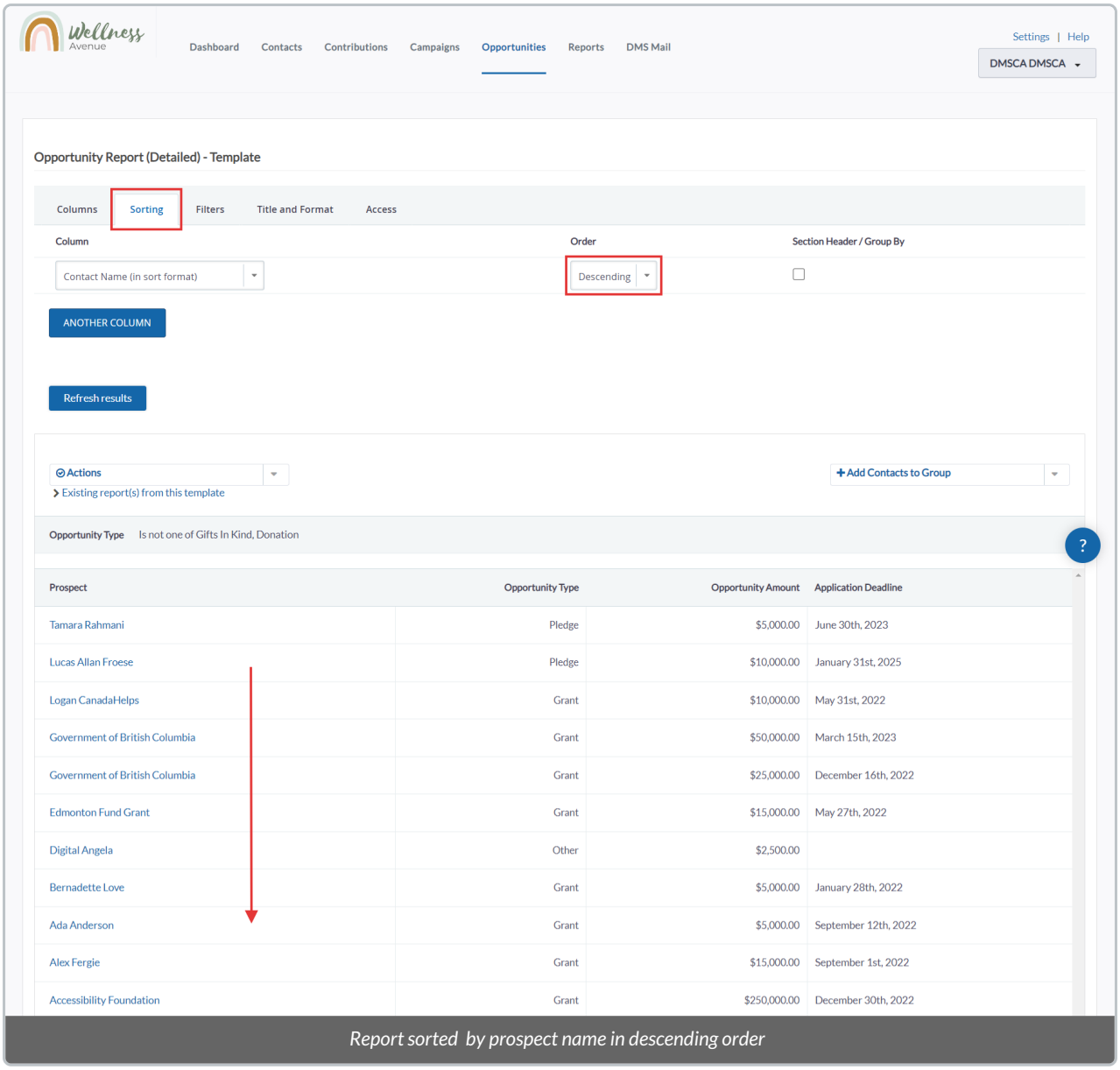
1. Sorting specific **Columns** on your Report in **ascending or descending order.**

- **Before:**



Report sorted by prospect name in ascending order

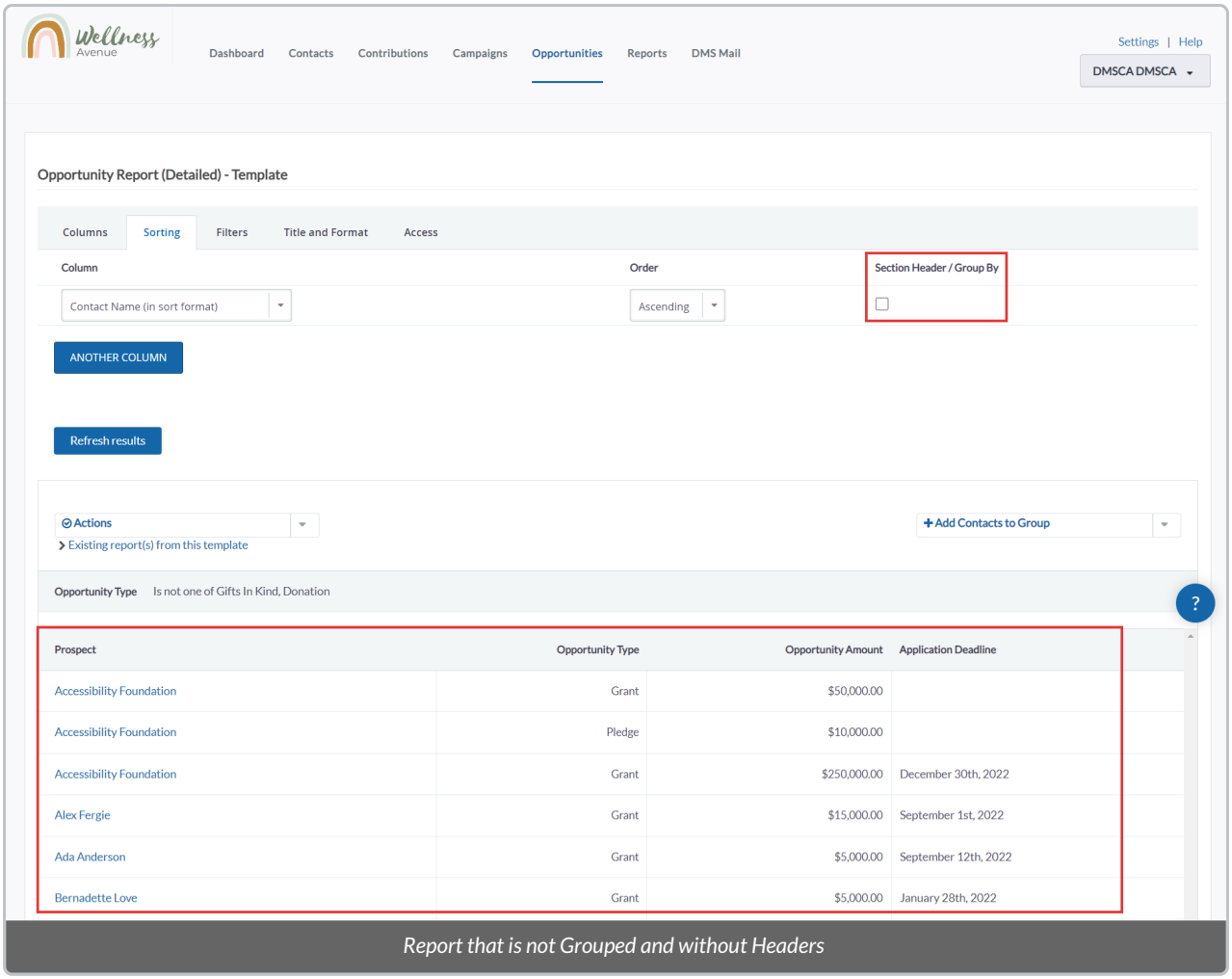
- **After:**



Report sorted by prospect name in descending order

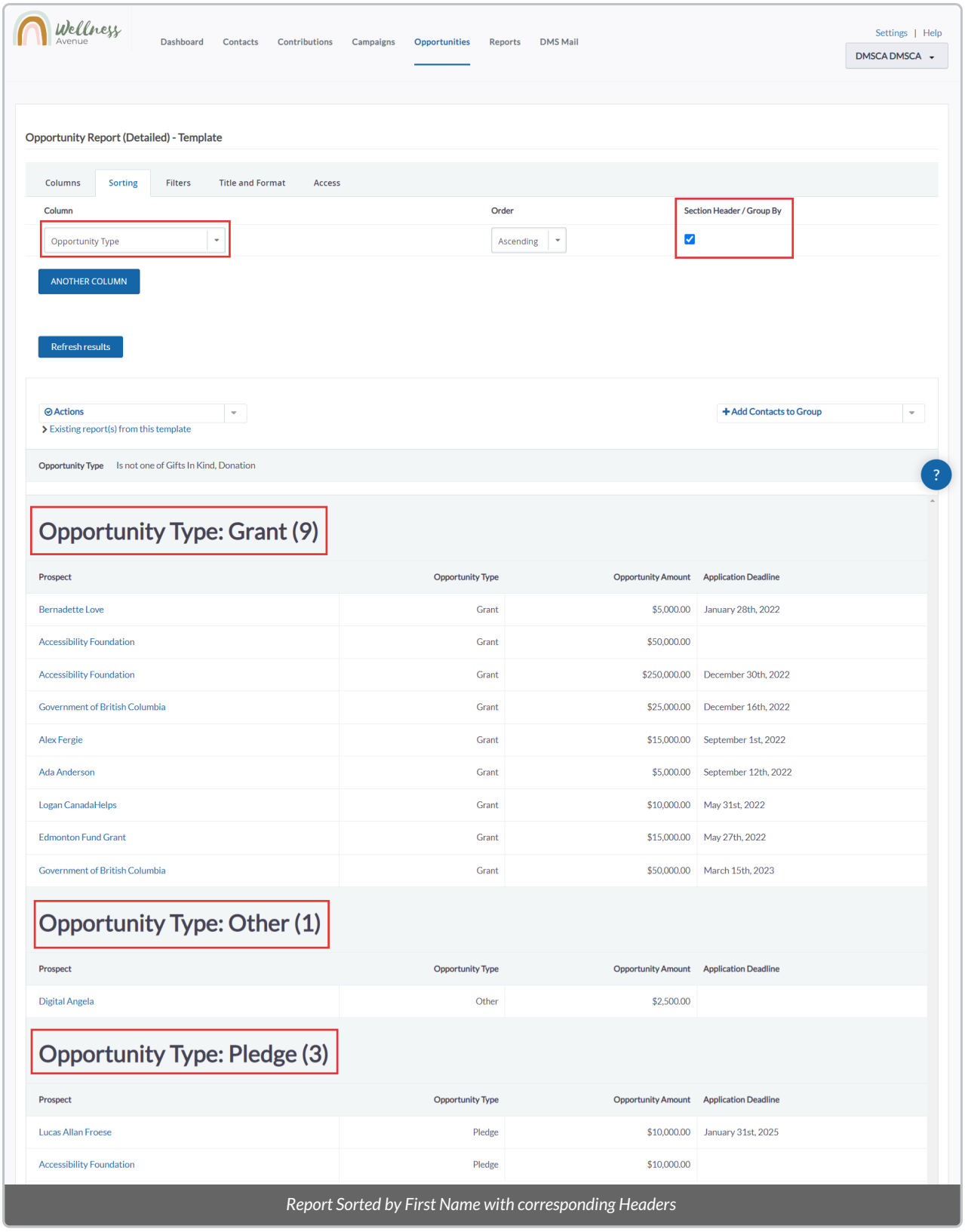
2. Placing a specific **Column** on as **a header**.

- **Before:**



Report that is not Grouped and without Headers

- **After:**



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.

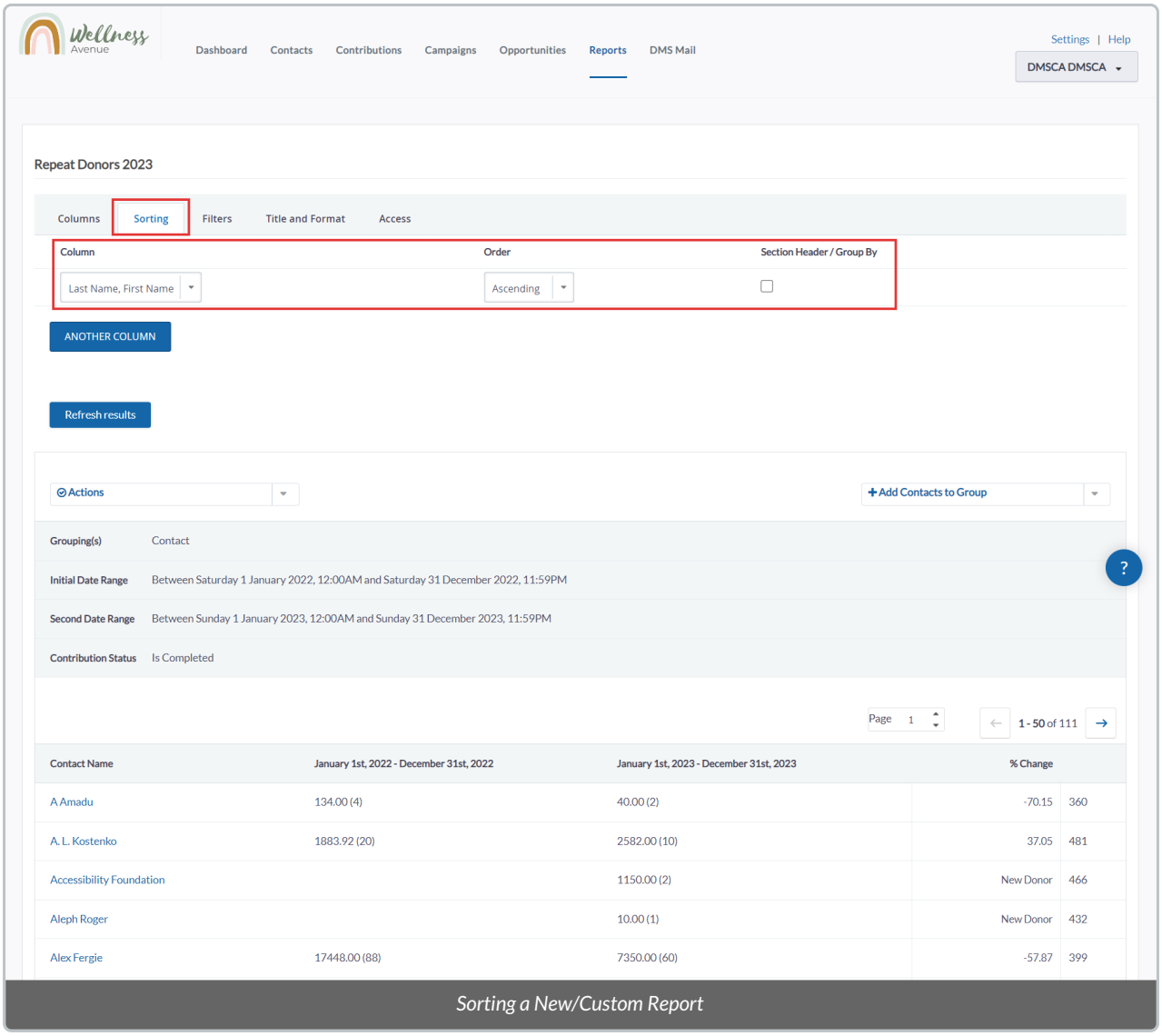
Apply Sorting to Reports

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)



Sorting a New/Custom Report

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