

Sorting on Select Reports

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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.

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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

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:

Wellness Avenue

Dashboard Contacts Contributions Campaigns **Opportunities** Reports DMS Mail

Settings | Help

DMSCA DMSCA

Opportunity Report (Detailed) - Template

Columns Sorting Filters Title and Format Access

Column Opportunity Type Order Ascending Section Header / Group By

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. At the top, there is a navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports (selected), and DMS Mail. A 'Settings | Help' link and a 'DMSCA DMSCA' dropdown are also present.

The report title is 'Repeat Donors 2023'. Below it, there are tabs for 'Columns', 'Sorting' (highlighted with a red box), 'Filters', 'Title and Format', and 'Access'. The 'Sorting' tab is active, showing a configuration area with three sections: 'Column' (set to 'Last Name, First Name'), 'Order' (set to 'Ascending'), and 'Section Header / Group By' (with an unchecked checkbox). Below these are buttons for 'ANOTHER COLUMN' and 'Refresh results'.

Below the sorting options, there are 'Actions' and '+ Add Contacts to Group' dropdowns. The report filters are: 'Grouping(s): Contact', 'Initial Date Range: Between Saturday 1 January 2022, 12:00AM and Saturday 31 December 2022, 11:59PM', 'Second Date Range: Between Sunday 1 January 2023, 12:00AM and Sunday 31 December 2023, 11:59PM', and 'Contribution Status: Is Completed'. A blue question mark icon is visible on the right side of the filter area.

At the bottom of the filter area, there is a pagination control showing 'Page 1' and '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

At the bottom of the report area, there is a dark grey bar with the text 'Sorting a New/Custom Report'.

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

