Navigating the Reports Tab & Available Reports

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Donor Management System

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The ***Reports Tab*** contains a list of ***Contribution***, ***Contact***, and ***Opportunity*** Reports that can be used to understand key insights about the Contacts and Contributions in your DMS.

Learn more:

- Filter, Sort and add Custom Columns on **Standard Reports**
- Add your own Custom Reports using templates from the **New Report** page

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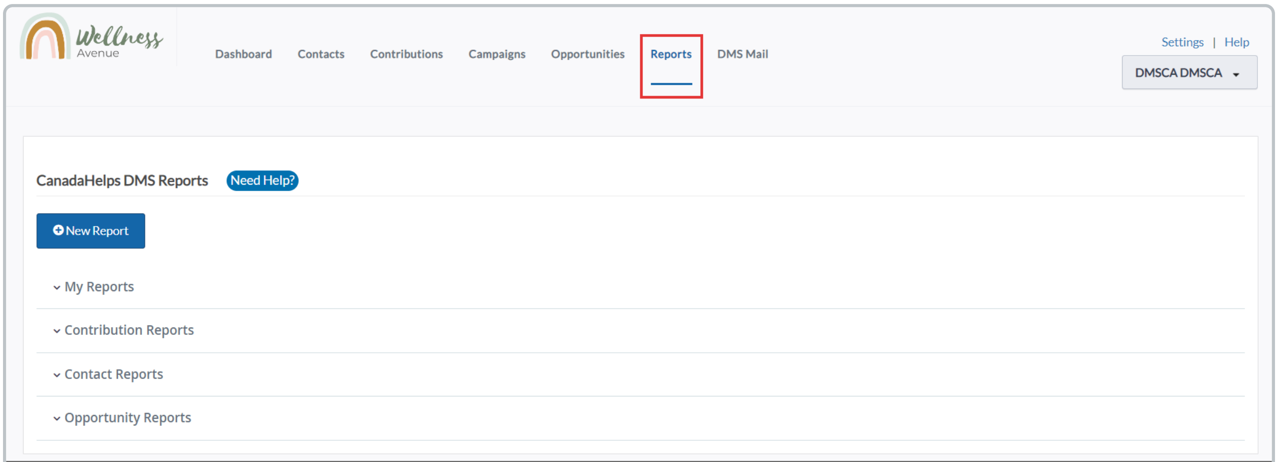
Reports Overview



Reports tab

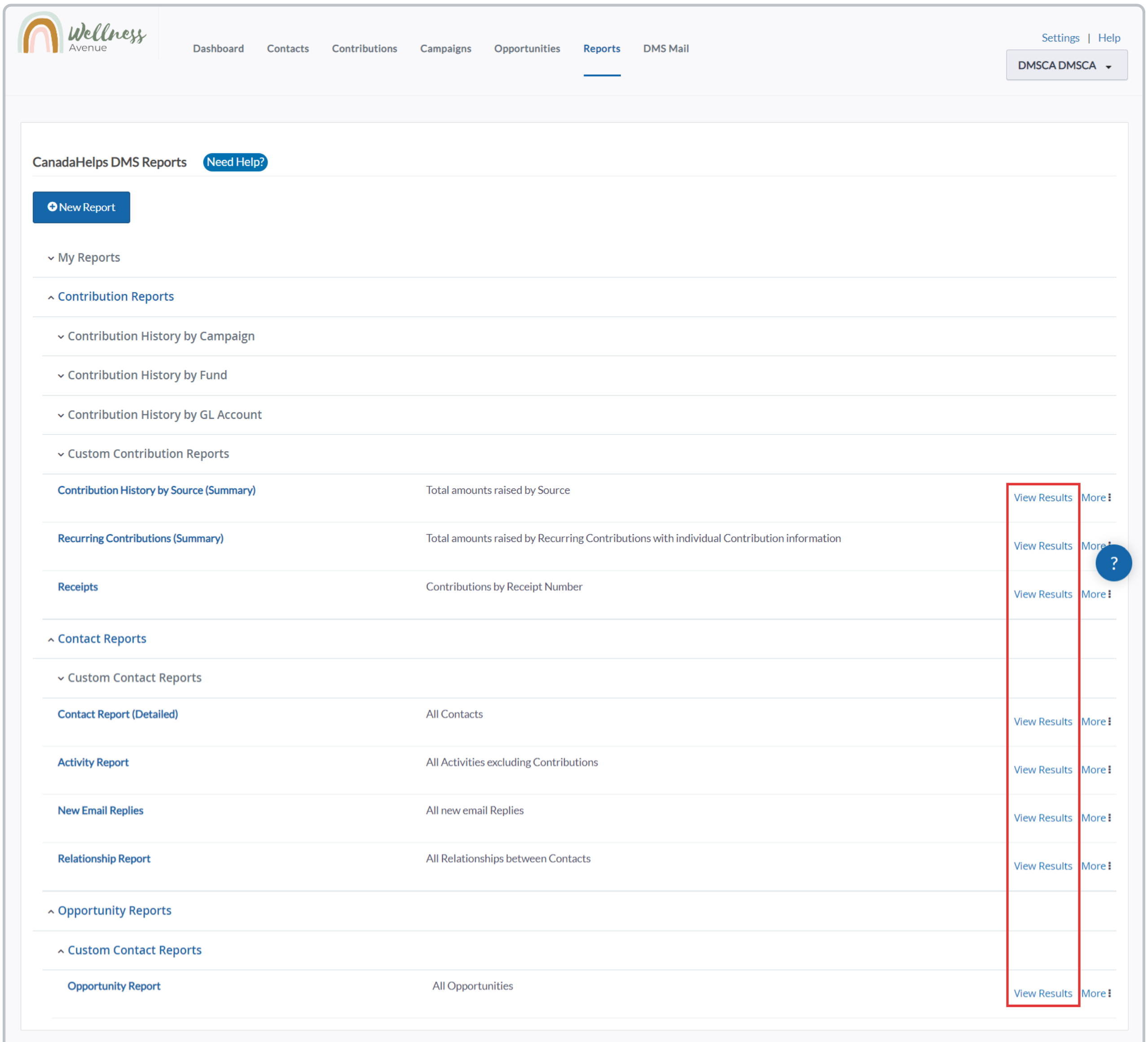
Each Report is represented by a row and contains:

- **The name** of the Report, (e.g. *Contribution History by Campaign (Summary)*),
- **A description** of the Report,
- **And the option to run** the Report by selecting *View Results*.

Running a Report

You have two options to run any Report:

1. Under the ***Reports Tab***, select ***View Results*** beside a Report to generate it with the pre-set columns and filters:



View results

2. Otherwise, **select the name of a Report** to be able to customize its Columns, Sorting and Filters. Once ready, select ***Refresh Results.***

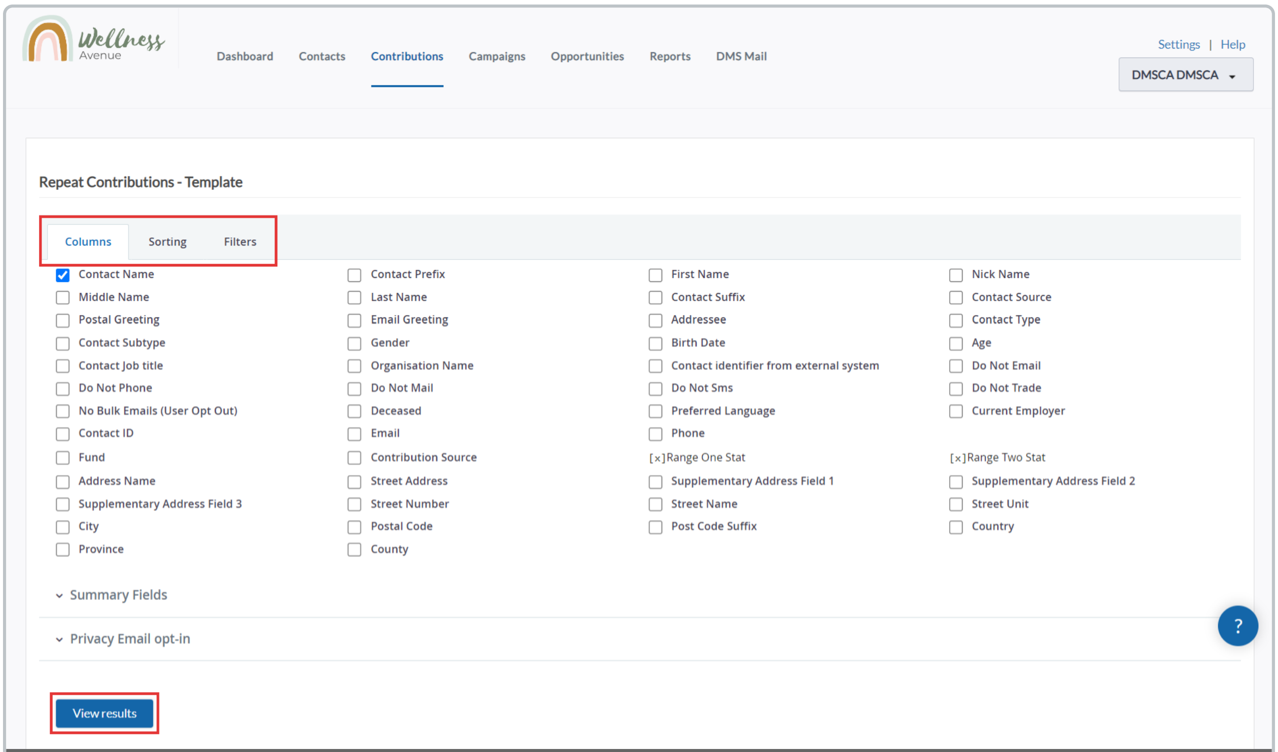


Image caption

Using Reports

Data-Driven Decision Making

Results-driven charities leverage the data in their reports to measure the success of their campaigns. Common metrics include total contributions, amount of funding raised, or the number of new monthly donors at the end of a campaign. Depending on the results of the campaign, charities may identify new trends, donor behaviours and improvement opportunities to help shape and maximize the return on future campaigns.

Verifying Data

Use reports to compare manually entered data against the source to ensure data has been correctly inputted into the DMS. Charities use reports to check for missing, incorrect or poorly formatted data.

How Often Should I Run a Report?

For a new campaign, you may want to keep a close eye on performance to measure if your changes are going as planned by pulling a Contribution Report from week to week. Based on the results, you can adapt quickly or even predict what minor adjustments you may need to make to improve the success of the campaign or tweak the messaging in a newsletter to improve engagement.

For other long-running and typically well-performing campaigns, you might want to run a month-to-month report to ensure you're on track to meeting organizational objectives.

For strategic planning, executive teams may want quarterly and annual reports to see if the overall strategy aligns with the performance of campaigns.

For data reconciliation and verification, you may want to do it every month to ensure you're inputting the correct information in the DMS.

Contribution Reports

1) Campaign Reports

Campaign Reports provide insight into the progress and outcomes of your fundraising Campaigns. Campaign Reports are useful if you are interested in knowing how the specific initiatives you are using to raise money are performing.

Contribution History by Campaign (Summary)

- Provides a summary of the total amount raised and the total number of Contributions in each Campaign.
- It can be filtered by one or more Campaigns to give you a snapshot of how much money has been raised in any Campaign within any time period.

Contribution History by Campaign (Monthly)

- Provides a summary of the total amount raised in each Campaign by month.
- See a monthly comparison of one or more Campaigns.

Contribution History by Campaign (Yearly)

- Provides a summary of the total amount raised in each Campaign sorted by year.
- Shows a yearly comparison of one or more Campaigns.

Contribution History by Campaign (Detailed)

- Provides detailed information on each Contribution that has been made to each Campaign including the Name of the Contact who made the Contribution.
- Understand the value of Contributions to each Campaign and which Campaigns your specific Contacts are donating towards.

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2) Fund Reports

Fund Reports provide insight into how much of the money you have raised has been allocated to the specific Funds you have configured in your DMS. Fund Reports will enable you to track what can be spent on various initiatives.

Contribution History by Fund (Summary)

- Provides a summary of the total amount and the total number of Contributions allocated to each Fund.
- It can be filtered by one or more Funds to give you a snapshot of how much money has been allocated to any Fund within any time period.

Contribution History by Fund (Monthly)

- Provides a summary of the total amount that has been allocated to each Fund by month.

- See a monthly comparison of one or more Funds.

Contribution History by Fund (Yearly)

- Provides a summary of the total amount that has been allocated to each Fund by year.
- See a monthly comparison of one or more years.

Contribution History by Fund (Detailed)

- Provides detailed information on each Contribution that has been allocated to each Fund including the name of the Contact who made the Contribution.
- Understand the value of Contributions to each Fund and which Funds your specific Contacts are contributing towards.

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3) GL Account Reports

GL Account Reports provide insight into how much of the money you have raised has been allocated to the specific GL Accounts you have configured in your DMS.

Contribution History by GL Account (Summary)

- Provides a summary of the total amount of Contributions in each GL Account.
- Assist in reconciling the Contributions in your DMS with your accounting software.

Contribution History by GL Account (Detailed)

- Provides a detailed overview of each Contribution in your DMS with their financial account information like GL Code, GL Account Name and Account Type (Revenue, Expenses, etc.)
- It can be used to reconcile your DMS with your accounting software.

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4) Receipts Report

- The Receipts Report provides a full list of all Contributions that have been issued a Tax Receipt, the Name of the Contact, the amount of the Contribution and the Tax Receipt Number.
- It can be filtered by Source to identify which Contributions have been receipted directly through the DMS or receipted outside of the DMS such as CanadaHelps or other third party sources.

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5) Other Contribution Reports

There are additional Reports that can be used to provide further insights into the data in your DMS. These include the following:

Contribution History by CH Fund (Summary)

- Summary of the total number of Contributions and total amount generated through Contributions to

CanadaHelps Funds (CH Funds).

- Evaluate which CH Funds are most active on your CanadaHelps.org Charity Profile.

Contribution History by Source (Summary)

- Summary of the total number of Contributions and the total amount generated through Contribution Source such as CanadaHelps or other sources like manual data entry or historic imports.
- Source is an important metric to evaluate and know where your Contributions are coming from. It can be useful to run this Report to evaluate your revenue sources over time.

How Do I Use Summary Reports?

- Provides your executive team with a snapshot of the overall performance of your campaigns and funds based on the number of contributions to determine where to allocate resources for future campaigns.
- View which donation sources are the most popular among your donors to help ensure you're providing the most convenient and effective giving experience for your donors.
- View which campaigns are the most successful among your donors to help guide future fundraising efforts.

How Do I Use Monthly Reports?

- Shape future campaigns.
  - Let's say you wrapped up a two-month campaign where you emailed a series of stories to your donors about how your charity directly improved the lives of specific individuals in need. If there was an uptick in donations during those months, you could draw the conclusion that this campaign resonated with your donors.
  - As you identify these types of trends, your marketing and strategic teams may choose to amplify engagement initiatives or increase the length of campaigns for well-performing months.

How Do I Use Yearly Reports?

- High-level planning for upcoming communication objectives.
  - In a report, you may notice that some of your funds are trending downwards or skyrocketing upwards.
  - This may be an indication that you're unintentionally over-saturating communications for a specific fund.
  - As a result, this may be an opportunity for your charity to refocus messaging in your communications and campaigns to draw attention to your other funds.
  - On the other hand, if you already have a balanced communications strategy and still notice a downward trend for some of your funds year over year, it may be prudent to reevaluate which funds your donors care about the most and reallocate resources accordingly.

How Do I Use Detailed Reports?

- Understand donor behaviours.
  - In these reports, charities can view how many repeat or new donors are contributing to their campaigns.
  - Repeat yet sporadic donations by the same donors may indicate they're interested in switching to monthly donations.
  - Smaller donations by new donors may indicate that they're interested in your cause or a specific fund but are waiting to see the social or environmental impact of your efforts before they further engage with your charity.
  - In short, charities can examine what types of donors are interested in specific campaigns and use this information to build stronger relationships with them. Use the search filters to get even more specific insights about your donor interests based on the demographics, spending power, communication preferences, and other factors that may be relevant to your organization.

Contact Reports

1) Contact Report (Detailed)

- The Contact Report provides a full list of all of your Contacts in your DMS, including their contact information, communication preferences and a summary of past Contributions.

2) Relationship Report

- A report outlining the relationship between Contact A and Contact B.

3) Activity Report

- A list of all Activities you've recorded in your contacts, displaying Activity Type, Date, and Status.

> **Note**: This report does not contain Contribution information for each contact.

4) New Replies Report

- Track your latest inbound emails (whenever a Contact sends an email to your DMS From Email, if your From Email settings are configured to receive replies to your DMS).

How Do I Use Contact Reports?

- Develop targeted communications.
    - When using the Activity Report, you'll be able to identify your most engaged donors at a glance.
    - Some may reach out for volunteer opportunities, others may simply want to learn more about your charity.
    - You can use this data to segment your donors by their activities to develop targeted communications for different each segment.
    - Perhaps you've identified and Grouped **and/or Tagged** donors who are interested in volunteering.
    - By creating this group ahead of time, you'll have a readily available list of volunteers you can reach out to for your next fundraiser, auction or other events.

Opportunity Reports

Opportunity Report

- The Opportunity Report lists all active opportunities you have set in your DMS including Gifts in Kind, Donations, Grants and more.

How Do I Use Opportunity Reports?

- Streamline the targeted communications process for major donations and grant applications.
    - One common use of these reports is to help manage your grant applications.
    - Government grants, for instance, require charities to be exceptionally thorough in their proposals. Luckily, some of the required information in these applications may not differ from one grant to another.
    - Knowing this, resourceful charities may use Opportunity Reports to identify upcoming government grant application deadlines and plan to complete these applications simultaneously.
    - Rather than searching for information every time a new application needs to be completed, Opportunity Reports help charities streamline how and when they apply for grants.

New Reports

From the Reports Tab, you can select the **New Report** button, in order to access a wide variety of customizable report templates.

These Reports may be more flexible and have more column and filter options than the pre-built reports above. The Report templates are segmented by Report type:

1) Contribution Reports (New Reports)

Contribution Summary Report

- Summary of number of contributions and total amount of contributions, segmented by calendar month
- This report can be generated as a table, bar, and pie chart, which can also be added as a Dashlet

Contribution Detail Report

- This report is highly detailed and all available DMS contribution fields can be added as columns

Repeat Contributions Report

- View each donor's percent (%) change in total donation amount between two date ranges
- The Report default compares the previous calendar year to the current calendar year

Contributions by Organization Report

- View Individual contributions, which are grouped based on common Employer/Organization Contacts

Contributions by Household Report

- Group Contribution records based on Households and related Contacts

Top Donors Report

- Sorted based on all-time donation amounts and amount of last contribution per donor

SYBUNT Report

- "Some Years, But Unfortunately Not This" Year Report

LYBNT Report

- "Last Year, But Not This" Year Report

Contributions for Bookkeeping

- Used for bookkeeping and can be exported from the DMS to be imported into your QuickBooks Online accounting software

Recurring Contributions Reports

- Total amounts raised from recurring/monthly Contributions by each Payment Method or detailed information about recurring payment frequency and dates

Tax Receipts - Receipts Issued

- View all Receipts that have been issued within the DMS, including the delivery method, receipt number, the issuer, and date issued

Tax Receipts - Receipts Not Issued

- View a list of all Contributions that are either ineligible for Tax Receipt **or** have not yet been issued
- Please note that you will be unable to perform **Actions** on this Report
    - If you wish to issue Tax Receipts for these Contributions, please follow the instructions below:
        - Perform an Advanced Search for Contributions (i.e. Contribution Date Received: the previous calendar year)
        - Select all records
        - Select **Actions** and Issue Tax Receipts separate or combined
        - Leave "Also Re-Issue Duplicates" checkbox **unchecked**, in order to only issue receipts for not-yet-receipted donations
            - **Note:** Contributions that are marked as EXCLUDE FROM TAX RECEIPTING and/or that have been processed by CanadaHelps.org will be excluded from this Action and will not be receipted.

Retention Rate Report

- View the total number of New and Repeat Donors year over year, including a breakdown of each donor name

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2) Contact Reports (New Reports)

Contacts (Summary)

- Summary information about your Contacts, including contact information and summary contribution history

Contacts (Detailed)

- Contribution information per Contact, including contact information and summary contribution history

Activity Reports

- Activities (i.e. Emails, MailMerge, Calls, Meetings, Contributions) with details on the Activity Type, description, date, and status

Current Employer Report

- View each Employer, Employee, and Employee Job Title including the time they have been employed

Relationship Report

- See which Contacts are connected to each other using Relationships, including, Employers, Household members, Partners, Siblings, and more
- Learn more about Relationships here

Database Log Report

- Track who within your organization has made modifications to your DMS Contact or Contribution records

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3) Mail Reports (New Reports)

The following reports can be accessed to track the success of all your Bulk Emails (DMS Mail) at a glance:

Mail Bounce Report

Mail Summary Report

Mail Opened Report

Mail Click-Through Report

Mail Detail Report

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4) Opportunity Reports (New Reports)

Opportunity Report (Detailed)

Opportunity Report (Statistics)

Frequently Asked Questions

What are reports?

Reports are a tool to help charities view how they are progressing and meet organizational objectives at a high level. In a quick snapshot, charities can examine information like funding raised from year to year, the total number of contributions for a specific campaign, and the relationships with donors to quickly identify what they're doing well and the opportunities for improvement. As such, charities often use the information in these reports to dictate short-term tasks and long-term strategies.

Why do I need reports?

Results-driven charities use reports to make data-informed decisions quickly and efficiently. Especially during the busier times of the year, such as an end of a quarter or at the start of a new campaign, most charities don't have the luxury of wading through multiple spreadsheets and a flurry of Post-it notes to recover information about previous campaigns and donor history. Thanks to the DMS, donor and campaign information is all centralized. Reports help charities immediately pull the salient information they need to help make decisions about communications, fundraising, and beyond.

Can I export reports?

Yes, you can export reports as a CSV or a PDF. To learn more, please read our article on Exporting and Saving Reports.

Can I create a custom report?

Yes, you customize Standard Reports using specific Filters or Columns. You can also create a Custom Report with the New Reports function. Whichever option you choose, you'll have the opportunity to Save your Custom Reports to reuse for your weekly, monthly, quarterly, or other reporting needs.

Do I need to know how to use formulas for Reports?

No, you do not need to know how to use formulas or other math to use the Reports. Regardless of how you customize each report, the DMS takes care of the calculations for you on the backend.