Saving and Exporting Reports

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Donor Management System

Want to learn more about this feature?

Watch our Training Webinars here

Reports can be customized using specific Filters or Columns that are most important to you. Once you have your desired filters and columns in place, you can

- Save these Custom Reports to use them again,
- Delete Custom Reports, and also
- Export the data in any Standard or Custom Report.

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- Deleting Custom Reports
 - From the Reports Tab
 - From the Report Details page
- Exporting Reports
 - From the Reports Tab (Export)
 - From the Report Details page (Export)

Saving Custom Reports

1. Visit the Reports Tab.

2. On the next page, you will see a list of our Standard Reports, organized by the following sections.

- Contribution Reports
- Contact Reports
- Opportunity Reports
- New Report Button

| Mellness Avenue Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail | Settings Help DMSCA DMSCA |
|--|-----------------------------|
| CanadaHelps DMS Reports Need Help? | |
| ♥ New Report | |
| ~ Contribution Reports | |
| ~ Contact Reports | |
| ~ Opportunity Reports | |
| Reports tab | |

3. Select the Report Section to view the expanded list of Report options

| Dashboard Contacts Contributions Ca | npaigns Opportunities Reports DMS Mail | Settings Help DMSCA DMSCA + |
|--|--|----------------------------------|
| CanadaHelps DMS Reports Need Help? | | |
| • New Report | | |
| My Reports Contribution Reports | | |
| | | |
| | Expand a Reports Heading | |

4. Select the Report you want to customize

| Wellness Avenue Da | ishboard Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | | Settings Help |
|--|-------------------|---------------|----------------|--------------------|---------|----------|--|---------------------|
| CanadaHelps DMS Reports | Need Help? | | | | | | | |
| New Report My Reports | | | | | | | | |
| - Contribution Reports | | | | | | | | |
| Contact Reports | | | | | | | | |
| Custom Contact Reports | | | | | | | | |
| Contact Report (Detailed) | | | All Contacts | | | | | View Results More # |
| Activity Report | | | All Activities | excluding Contribu | itions | | | View Results More ! |
| New Email Replies | | | All new email | I Replies | | | | View Results More ! |
| Relationship Report | | | All Relations | hips between Cont | acts | | | View Results Mo |
| Opportunity Poporto | Select a Report | | | | | | | |

5. Apply any desired **Columns** or **Filters** and select *Refresh results* to generate the Report.

| Wellness Avenue Dashboard | Contacts Contributions Campaigns Opportu | inities Reports DMS Mail | Settings He |
|------------------------------|--|---|---|
| Contact Report (Detailed) | | | |
| Columns Filters | | | |
| [×]Contact Name | Contact Prefix | First Name | Nick Name |
| Middle Name | Last Name | Contact Source | Postal Greeting |
| Email Greeting | Contact Type | Contact Subtype | Gender |
| Birth Date | Contact Job title | Organisation Name | Contact identifier from external system |
| Do Not Email | Do Not Phone | Do Not Mail | Do Not Sms |
| Do Not Trade | No Bulk Emails (User Opt Out) | Deceased | Preferred Language |
| Current Employer | Modified Date | 🛃 Email | Phone |
| Phone Extension | | | |
| Street Address | Supplementary Address Field 1 | Supplementary Address Field 2 | City |
| ✓ Postal Code | Province | 🗹 Country | |
| ✓ Summary Fields | | | |
| → Privacy Email opt-in | | | |
| Refresh results | | | |
| | Select vour columns, apr | olv your filters, and Refresh result | ts |

6. Once you have your results, select the *Actions* menu, and then *Save a Copy*

| Wellness Avenue | Dashboard Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | | | | DMS | Settings Help CADMSCA + |
|---------------------------|--------------------|---------------|-----------|--------------------|----------------|----------------------------------|----------------------------------|---------|----------------|-----------------|------------------------------|
| Contact Report (Detailed) | | | | | | | | | | | |
| Columns Filters | | | | | | | | | | | |
| Refresh results | | | | | | | | | | | |
| Actions Save a Conv | <u>^</u> | | | | | | | | | | |
| Export as CSV | | | | | | | | | | | |
| | | | | | | | | Page | 1 📫 | ← 1-50 o | f 178 → |
| Contact Name | Email | | Phone | Phone Extension | Street Address | Supplementary Address Field 1 | Supplementary Address Field 2 | City | Postal Code | Province | Country |
| A Amadu | amadua@canadahelp | os.org | | | | | | | | | ? |
| A Amadu | amadua@canadahelp | os.org | _ | | 123 Fake St | _ | | Toronto | L6A 2Y5 | Ontario | Canada |
| | | | | Actions > : | Save a Co | ору | | | | | |

7. Create a *Report Title* and *Description*. If you select to *Add to My Reports*, the Report will only be available to you under your **My Reports heading** and will be hidden from the rest of your organization's DMS users.

| Avenue Dat | shboard Contacts Contri | butions Campaigns Op | oportunities Reports I | DMS Mail | | | Settings Help DMSCA DMSCA + |
|---|--|---|-----------------------------------|----------------------------------|---------------------------------------|------------|---------------------------------------|
| Contact Report (Detailed) | Save a copy | | | | | × | |
| Columns Filters Refresh results Save a Copy Deceased Is equal to No | Report Title ? Report Description Add to My Reports? ? | Report of All Contacts All Contacts with names, en | nail addresses and donatio | n of the reports listing | spage and will only be visib | ie by you. | |
| Contact Name | Email | Phone | Phone Street Address Extension | Supplementary Address Field 1 | Supplementary City Address Field 2 | Page 1 | ← 1-50 of 178 → Province Country ? |
| | | Save | > Add to My Rep | orts | | | |

Note: If you have saved the Report with no privacy restrictions, it will be saved in your *Reports Tab*, under *either* the Contribution, Contact, Mail, or Opportunity category, depending on which type of Report it is based on. Select the Custom Reports heading within each category to expand and view.

| Archite | Home Contacts Contributions Campaigns Opportunities Reports Administer | DMSCA DMSC |
|--|---|----------------|
| Carada Halas DMC David | | |
| CanadaHelps DMS Repo | ports | |
| | - | |
| Contribution Reports Contact Reports | 15 | |
| Custom Contact Re | Reports | |
| My Custom Contact R | Report All Contacts | View Results M |
| Contact Report (Detaile | iled) All Contacts | View Results M |
| Activity Report | All Activities excluding Contributions | View Results M |
| New Email Replies | All new email Replies | View Results M |
| Relationship Report | All Relationships between Contacts | View Results M |
| ~ Opportunity Reports | 13 | |
| | | |
| | | |
| | | |
| change the | he privacy restrictions of your custom Report, navigate back to the Report and select | t |
| cess. Then, | n, check or uncheck Add to My Reports? | |
| | | |
| | | |
| My Custom R | Report (Staff Member Donations) | |
| | | |
| Columns | Sorting Filters Title and Format Access | |
| Availa | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be vi ilable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | isible by you. |
| Availa | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be vi ilable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | isible by you. |
| Availa View resul | Add to My Reports? I if set to Yes, this report will appear in the My Reports section of the reports listing page and will only be vi ilable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | isible by you. |
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| View resul | Add to My Reports? I if set to Yes, this report will appear in the My Reports section of the reports listing page and will only be will able for Dashboard? Users with appropriate permissions can add this report to their dashboard. | isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be vi ilable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be vi ilable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | isible by you. |
| View resul | Image: | isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be villable for Dashboard? Users with appropriate permissions can add this report to their dashboard. Actions once again and Save. | isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be villable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | Isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be villable for Dashboard? Users with appropriate permissions can add this report to their dashboard. Interpretation of the reports and the reports are calculated as the report of the reports are calculated as the report of the reports and the report of the reports are calculated as the report of the reports are calculated as the report of the reports are calculated as the report of the re | Isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be villable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | Isible by you. |
| View resul | Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be v liable for Dashboard? Users with appropriate permissions can add this report to their dashboard. | Isible by you. |

| Columns | Sorting | Filters | Title and Format | Access | | | | | | |
|-----------------|------------------------------|--------------------------|---|-------------------------------------|----------------------------|-------------------------------|---------------------------------|----------------------|---------------|--------------------|
| Ad Available | d to My Repor for Dashboa | ts? 🔽 If se rd? 🗌 Use | et to Yes, this report w rs with appropriate p | vill appear in th ermissions car | ne My Repo n add this i | orts section report to the | of the reports eir dashboard | s listing page I. | and will only | / be visible by yo |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Save | | | | | | | | | | |
| Save a Copy | | | | | | | | | | |
| Print Report | | | | | | | | | | |
| Export as CSV | | | | | | | | | | |
| Delete report | | | | | | | | | | |
| | | | • | | | | | | | +/ |
| | | | | | | | | | | |

Deleting Custom Reports

From the Reports Tab

1. Visit the *Reports Tab*.

2. On the next page, you will see a list of our Standard Reports, organized by the following sections.

- Contribution Reports
- Contact Reports
- Opportunity Reports
- New Report Button

| Wellness Avenue Dashboard Cor | tacts Contributions Campaigns Oppo | tunities Reports DMS Mail | Settings Help DMSCA DMSCA + |
|--------------------------------------|------------------------------------|---------------------------|----------------------------------|
| CanadaHelps DMS Reports (Need Help?) | | | |
| • New Report | | | |
| Contribution Reports | | | |
| ∽ Contact Reports | | | |
| ✓ Opportunity Reports | | | |
| | | Reports tab | |

3. Depending on your Report type, select the corresponding Report Section to reveal the Custom Report

subheading containing your saved Custom Report. If you've saved your report under *My Reports*, open this heading instead.

| Avenue Dashboard Contacts Co | ntributions Campaigns Opportunities Reports DMS Mail | Settings DMSCA DMSC |
|---|---|------------------------|
| | | |
| New Report | | |
| MuReports | | |
| Contribution Reports | | |
| ~ Contribution History by Campaign | | |
| ~ Contribution History by Fund | | |
| ~ Contribution History by GL Account | | |
| Custom Contribution Reports | | |
| Contribution History by Source (Summary) | Total amounts raised by Source | View Results M |
| Recurring Contributions (Summary) | Total amounts raised by Recurring Contributions with individual Contribution informat | ion View Results M |
| Receipts | Contributions by Receipt Number | View Results M |
| Contact Reports | | |
| ← Custom Contact Reports | | |
| Contact Report (Detailed) | All Contacts | View Results M |
| Activity Report | All Activities excluding Contributions | View Results M |
| New Email Replies | All new email Replies | View Results M |
| Relationship Report | All Relationships between Contacts | View Results M |
| Opportunity Reports | | |
| | | |

4. Select *More* on the right side of the specific Report you want to delete

| Contribution History by Fund | | |
|--|--|---------------------|
| ~ Contribution History by GL Account | | |
| ~ Custom Contribution Reports | | |
| Contribution History by Payment Method (Summary) | Overview of contributions by Payment Method | View Results More I |
| Fiscal Year to Date | Total amounts raised this fiscal year by month | View Results More I |
| Fiscal Year to Date (copy created by John Rainan on Dec 31st, 2021 12:18 PM) | | View Results More I |
| Last Year inc. Today | Total amounts raised last calendar year by quarters | View Results More I |
| Top contributors | Top contributors | View Results More # |
| top donors | Provides a list of the top donors during a time period you define. You can include as many donors as you want (for example, top 100 of your donors). | View Results More I |
| GL Account & Payment Method Reconciliation Report (Full) | Shows Bookkeeping Transactions Report | View Results More I |
| IATS Payments - Recurring Contributions Report | | View Results More I |
| SYBNT | Contributors who gave 'Some Year, But Not This' | View Results More ! |
| Contribution History by GL Account (Summary](deprecated) | Overview of contributions by GLAccount | View Results More I |
| Contribution History by Recurring Contribution (Summary) | Overview of Recurring Contributions | View Results More I |
| Customized Contribution History by Campaign (Summary) | Overview of Campaign contributions | View Results More I |
| Contribution History by Fund (Detailed Contact) | In depth view of contributions by Fund | View Results More I |
| | Reports > More | |

5. Select *Delete report* at the bottom

Note: when selecting your preferred option, you have to click on the name of the option itself for it to load.

| Wellness Avenue Dashboard Contacts Contri | butions Campaigns Opportunities Reports DMS Mail | Settings He DMSCA DMSCA - |
|--|---|----------------------------------|
| CanadaHelps DMS Reports Need Help? | | |
| My Reports Contribution Reports | | |
| Contact Reports | | |
| Custom Contact Reports | | |
| (Copy) Contact Report (Detailed) | All Organizations | View Results More Save a Copy |
| (Copy) Contact Report (Detailed) | All Contacts | View as pdf e |
| My Custom Contact Report | All Contacts | Print report Export to csv e |
| (Copy) Activity Report | All Activities excluding Contributions | Delete report |
| All Inbound Email | All mail received through Inbound Mail Accounts More > Delete report | |

From the Report Details page

1. Visit the Reports Tab.

- 2. On the next page, you will see a list of our Standard Reports, organized by the following sections.
 - Contribution Reports

- Contact Reports
- Opportunity Reports
- New Report Button

| Avenue Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail | Settings Help DMSCA DMSCA |
|--|-----------------------------|
| CanadaHelps DMS Reports (Need Help?) | |
| O New Report | |
| ~ My Reports | |
| ~ Contribution Reports | |
| ~ Contact Reports | |
| ~ Opportunity Reports | |
| Reports tab | |

3. Select the Report Section to view your Custom Reports subheading

| Avenue Dashboard Con | tacts Contributions Campaigns Opportunities Reports DMS Mail | Settings Help DMSCA DMSCA + |
|---|--|--|
| CanadaHelps DMS Reports (Need Help?) | | |
| • New Report | | |
| Contribution Reports Contribution History by Campaign | | |
| Contribution History by Fund Contribution History by GL Account | | |
| Custom Contribution Reports Contribution History by Source (Summary) | Total amounts raised by Source | View Results More : |
| Recurring Contributions (Summary) Receipts | Total amounts raised by Recurring Contributions with individual Contribution information Contributions by Receipt Number | View Results More ? View Results More ! |
| | Expand a Report section | |

4. Select View Results on the right side of the specific Custom Report you want to delete

| Avenue Dashboard Contacts Con | tributions Campaigns | Opportunities Re | ports DMS Mail | | DMSCA DM | ISC |
|---|----------------------|----------------------------|----------------------------|------------------------------|--------------|-----|
| nadaHelps DMS Reports Need Help? | | | | | | |
| • New Report | | | | | | |
| ~ My Reports | | | | | | |
| Contribution Reports | | | | | | |
| ~ Contribution History by Campaign | | | | | | |
| ~ Contribution History by Fund | | | | | | |
| ~ Contribution History by GL Account | | | | | | |
| Custom Contribution Reports | | | | | | |
| Contribution History by Source (Summary) | Total amou | nts raised by Source | | | View Results | N |
| Recurring Contributions (Summary) | Total amou | nts raised by Recurring Co | ontributions with individu | ual Contribution information | View Results | N |
| Receipts | Contributio | ons by Receipt Number | | | View Results | N |
| Contact Reports | | | | | | |
| - Custom Contact Reports | | | | | | |
| Contact Report (Detailed) | All Contact | S | | | View Results | м |
| Activity Report | All Activitie | s excluding Contributions | S | | View Results | м |
| New Email Replies | All new em | ail Replies | | | View Results | м |
| Relationship Report | All Relation | iships between Contacts | | | View Results | N |
| Opportunity Reports | | | | | | |
| Custom Contact Reports | | | | | | |
| Opportunity Report | All Oppor | tunities | | | View Results | N |
| | | | | | | |

5. On the **Reports Details** page, from the *Actions* menu, select *Delete report*

| Welliness Avenue Dashboard Contac | cts Contributions Campa | aigns Opportunities | Reports DMS Mail | | Settings Help DMSCA DMSCA + |
|--|-------------------------|---------------------|------------------|--------------|----------------------------------|
| (Copy) Contribution History by Fund (Detailed) |) | | | | |
| Columns Filters | | | | | |
| Refreshresults | | | | | |
| Save a Copy Print Report | | | | | |
| Export as CSV Save Delete report | ns Only | | | | |
| | | | | Page 1 🛟 🤶 1 | - 50 of 1442 → |
| | | Delete your (| Custom Report | | |

Exporting Reports

From the Reports Tab (Export)

1. Visit the Reports Tab.

2. On the next page, you will see a list of our Standard Reports, organized by the following sections.

- Contribution Reports
- Contact Reports
- Opportunity Reports
- New Report Button

| Wellness Avenue | Dashboard | Contacts (| Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings Help DMSCA DMSCA ~ |
|---------------------|----------------|------------|---------------|-----------|---------------|---------|----------|----------------------------------|
| | | | | | | | | |
| CanadaHelps DMS Re | ports Need Hel | p? | | | | | | |
| New Report | | | | | | | | |
| ∽ My Reports | | | | | | | | |
| ✓ Contribution Repo | orts | | | | | | | |
| ✓ Contact Reports | | | | | | | | |
| ∽ Opportunity Repo | rts | | | | | | | |
| | | | | | Repoi | rts tab | | |

3. Select one of the Report Sections to view the expanded list of Report options

| Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings Help DMSCADMSCA + |
|---|---|----------|---------------|-----------|---------------|---------|----------|------------------------------|
| CanadaHelps DMS Repor | ts Need Hel | p? | | | | | | |
| • New Report | | | | | | | | |
| Contribution Reports Contact Reports | | | | | | | | |
| ~ Opportunity Reports | ~ Opportunity Reports Expand a Reports Heading | | | | | | | |

4. Select *More* on the right side of the specific Report you want to export

| Dashboard Contacts Contributions | Campaigns Opportunities Reports DMS Mail | Settings Help DMSCA DMSCA |
|---|--|-----------------------------|
| CanadaHelps DMS Reports Need Help? | | |
| New Report My Reports | | |
| Contribution History by Campaign | | |
| Contribution History by Fund Contribution History by CH Fund (Summary) | Total amounts raised by CanadaHelps Fund | View Results More : |
| Contribution History by Fund (Summary) Contribution History by Fund (Detailed) | Total amounts raised by Fund Total amounts raised by Fund with individual Contribution information | View Results More : |
| Contribution History by Fund (Monthly) | Total amounts raised by Fund month over month | View Results Mo? |
| Contribution History by Eurol (Yearby) | Total amounts relied by European over year More options | |

5. Select your preferred export option

- View as pdf: download the Report as a PDF file.
- Print report: print the Report via your web browser's settings.
- Export to csv: download the Report as a .csv (can be opened with Excel, Google Sheets, etc.)

Note: when selecting your preferred option, you have to click on the name of the option itself for it to load.

| Wellness Dashboard Contacts Contributio | ns Campaigns Opportunities Reports DMS Mail | Settings Hel DMSCA.DMSCA - |
|--|---|------------------------------------|
| CanadaHelps DMS Reports Need Help? | | |
| • New Report | | |
| Contribution Reports | | |
| Contribution History by Campaign | | |
| ~ Contribution History by Fund | | |
| Contribution History by CH Fund (Summary) | Total amounts raised by CanadaHelps Fund | View Results More : Save a Copy |
| Contribution History by Fund (Summary) | Total amounts raised by Fund | View as pdf e : |
| Contribution History by Fund (Detailed) | Total amounts raised by Fund with individual Contribution information | Print report Export to csv e: |
| Contribution History by Fund (Monthly) | Total amounts raised by Fund month over month | View Results Mo |
| Contribution History by Fund (Yearly) | Total amounts raised by Fund war over year Export options | |

From the Report Details page (Export)

1. Visit the Reports Tab.

2. On the next page, you will see a list of our Standard Reports, organized by the following sections.

- Contribution Reports
- Contact Reports
- Opportunity Reports
- New Report Button

| Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings Help DMSCADMSCA + |
|---------------------|----------------|----------|---------------|-----------|---------------|---------|----------|---------------------------------|
| | | | | | | | | |
| CanadaHelps DMS Re | ports Need Hel | p? | | | | | | |
| ✓ My Reports | | | | | | | | |
| ~ Contribution Repo | orts | | | | | | | |
| ✓ Contact Reports | | | | | | | | |
| ∽ Opportunity Repo | rts | | | | | | | |
| | | | | | Repo | rts tab | | |

3. Select the different Report Sections to view the expanded list of Reports available

| Wellness Avenue | Dashboard Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | | Settings Help DMSCA DMSCA |
|--------------------------------|--------------------|---------------|--------------|--------------------|---------------|-------------------------|-------------------------|-----------------------------|
| CanadaHelps DMS Reports | Need Help? | | | | | | | |
| • New Report | | | | | | | | |
| ∽ My Reports | | | | | | | | |
| ~ Contribution Reports | | | | | | | | |
| ~ Contribution History by | Campaign | | | | | | | |
| ~ Contribution History by | Fund | | | | | | | |
| ~ Contribution History by | GL Account | | | | | | | |
| ✓ Custom Contribution Re | eports | | | | | | | |
| Contribution History by Source | e (Summary) | | Total amount | s raised by Source | • | | | View Results More : |
| Recurring Contributions (Sum | mary) | | Total amount | s raised by Recurr | ing Contribut | ions with individual Co | ontribution information | View Results More? |
| Receipts | | | Contribution | is by Receipt Numl | ber | | | View Results More : |
| | | | Ex | pand a Re | eport se | ection | | |

4. Select View Results on the right side of the specific Report you want to export

| Avenue Dashboard Contacts Cor | ntributions Campaigns | Opportunities | Reports | DMS Mail | Setting DMSCA DM | 35 ASCA |
|--|-----------------------|-----------------------|--------------|---|---------------------|--------------|
| nadaHelns DMS Reports Need Hein? | | | | | | |
| • New Report | | | | | | |
| | | | | | | |
| ✓ му керогтs | | | | | | |
| Contribution Reports | | | | | | |
| Contribution History by Campaign | | | | | | |
| Contribution History by Fund | | | | | | |
| ~ Contribution History by GL Account | | | | | | |
| Custom Contribution Reports | | | | | | |
| Contribution History by Source (Summary) | Total amou | nts raised by Source | | | View Results | ым |
| Recurring Contributions (Summary) | Total amou | nts raised by Recurri | ng Contribut | ions with individual Contribution information | View Results | ; M |
| Receipts | Contributi | ons by Receipt Numb | er | | View Results | ; Me |
| Contact Reports | | | | | | |
| - Custom Contact Reports | | | | | | |
| Contact Report (Detailed) | All Contac | .s | | | View Results | ; M |
| Activity Report | All Activiti | es excluding Contribu | utions | | View Results | ; M |
| New Email Replies | All new em | ail Replies | | | View Results | ; M |
| Relationship Report | All Relation | ships between Cont | acts | | View Results | ; M |
| Opportunity Reports | | | | | | - |
| Custom Contact Reports | | | | | | |
| Opportunity Report | All Oppor | tunities | | | View Results | ; М |
| | | | | | | |

5. On the **Reports Details** page, from the **Actions** menu, select your preferred export option:

- **Print Report:** print the Report via your web browser's settings.
- *Export as CSV:* download the Report as a .csv (can be opened with Excel, Google Sheets, etc.

| Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | | Settings F |
|-----------------------------|---------------|----------|---------------|-----------|---------------|-----------|-------------|---------------|--------------|
| ontribution History by So | ource (Summar | y) | | | | | | | |
| Columns Filters | | | | | | | | | |
| Refresh results | | | | | | | | | |
| ⊘ Actions | | • | | | | | | | |
| Save a Copy Print Report | | | | | | | | | |
| Export as CSV | | | | | | | | | |
| Source | | | | | | | Number Of C | Contributions | Total Amount |
| | | | | | | | | 121 | \$30,435.00 |
| CanadaHelps | | | | | | | | 80 | \$3,753.22 |
| Cash Collection | | | | | | | | 3 | \$10.50 |
| | | | | D | int or Fund | wt vour l | lonort | | |