

# Saving and Exporting Reports

Last Modified on 03/03/2023 2:00 pm EST

## 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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  - [From the Reports Tab \(Export\)](#)
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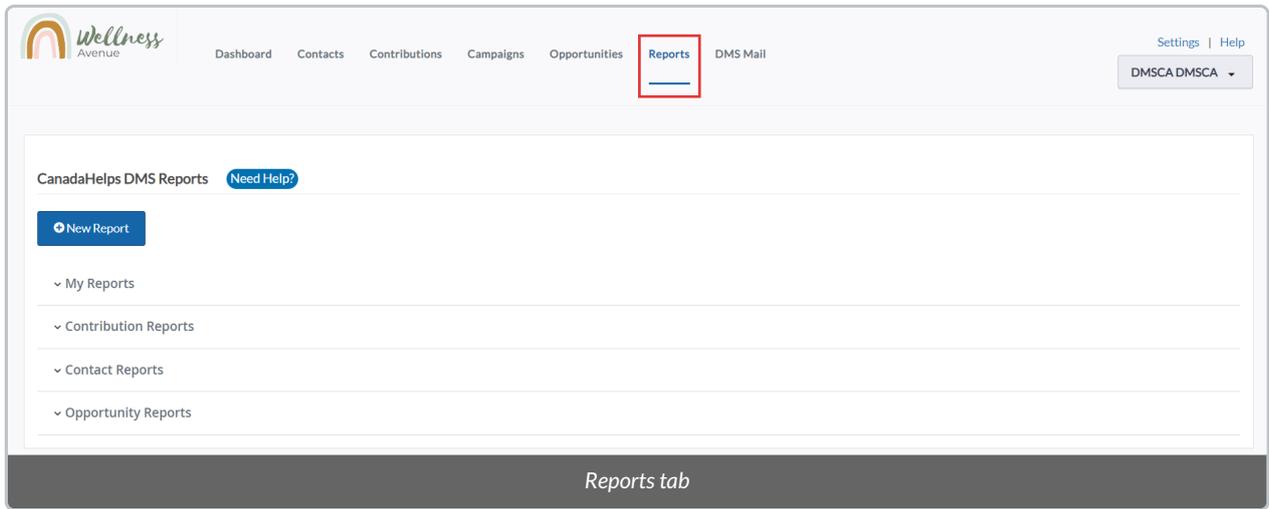
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## Saving Custom Reports

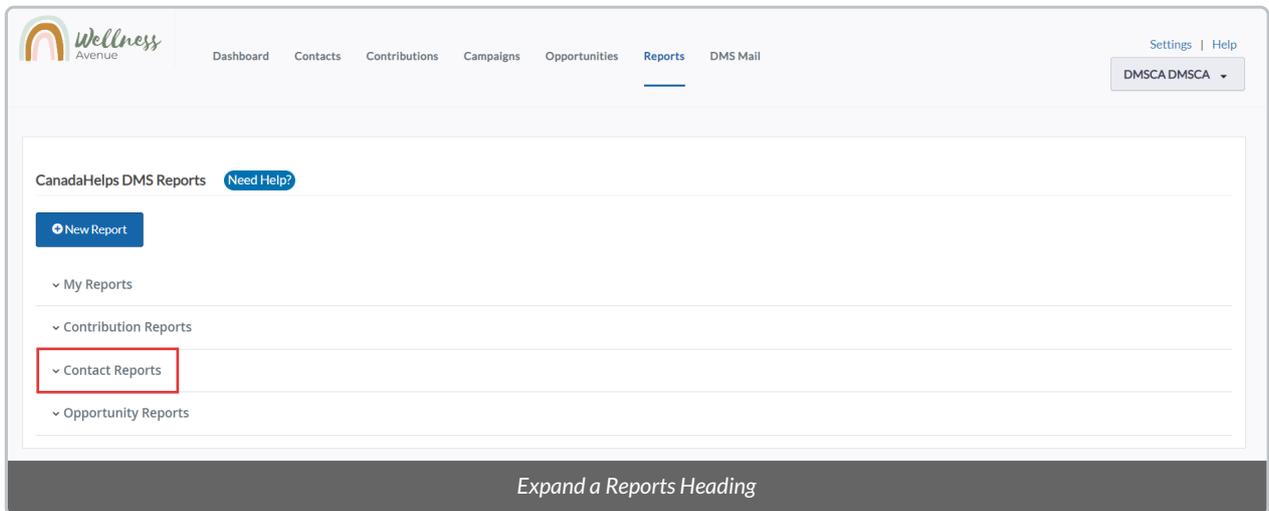
1. Visit the **Reports Tab**.

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

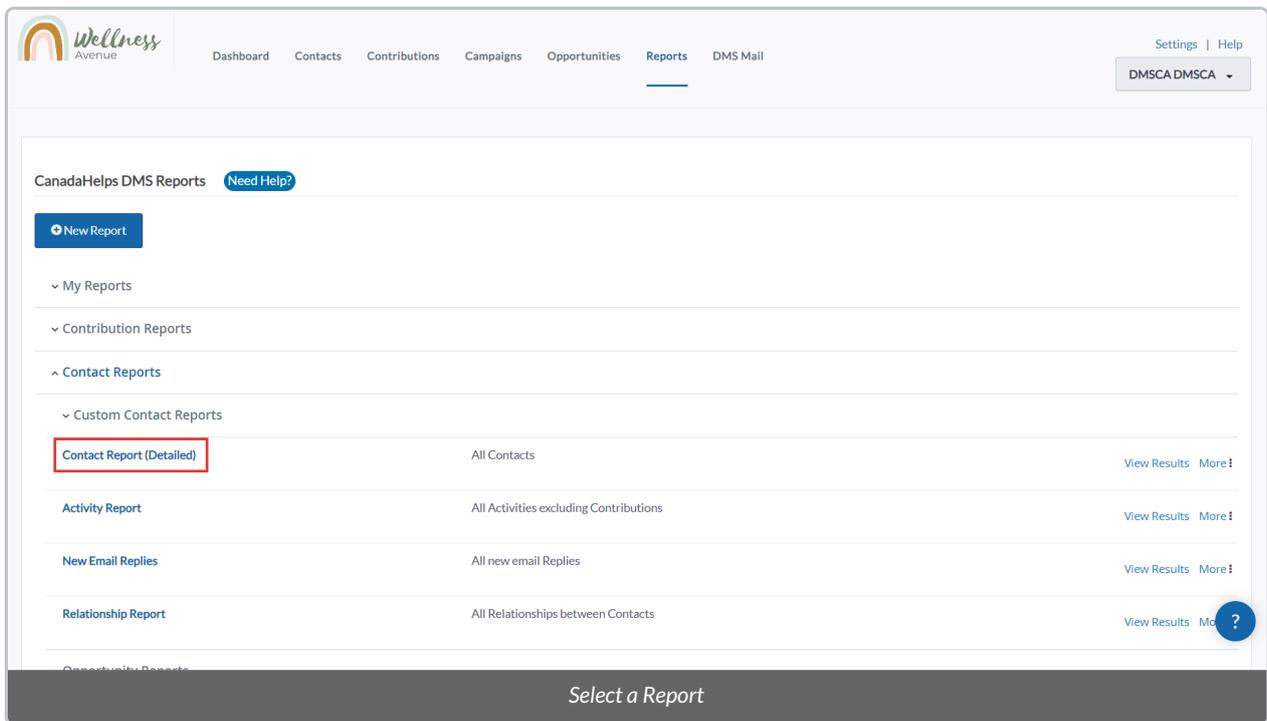
- [Contribution Reports](#)
- [Contact Reports](#)
- [Opportunity Reports](#)
- [New Report Button](#)



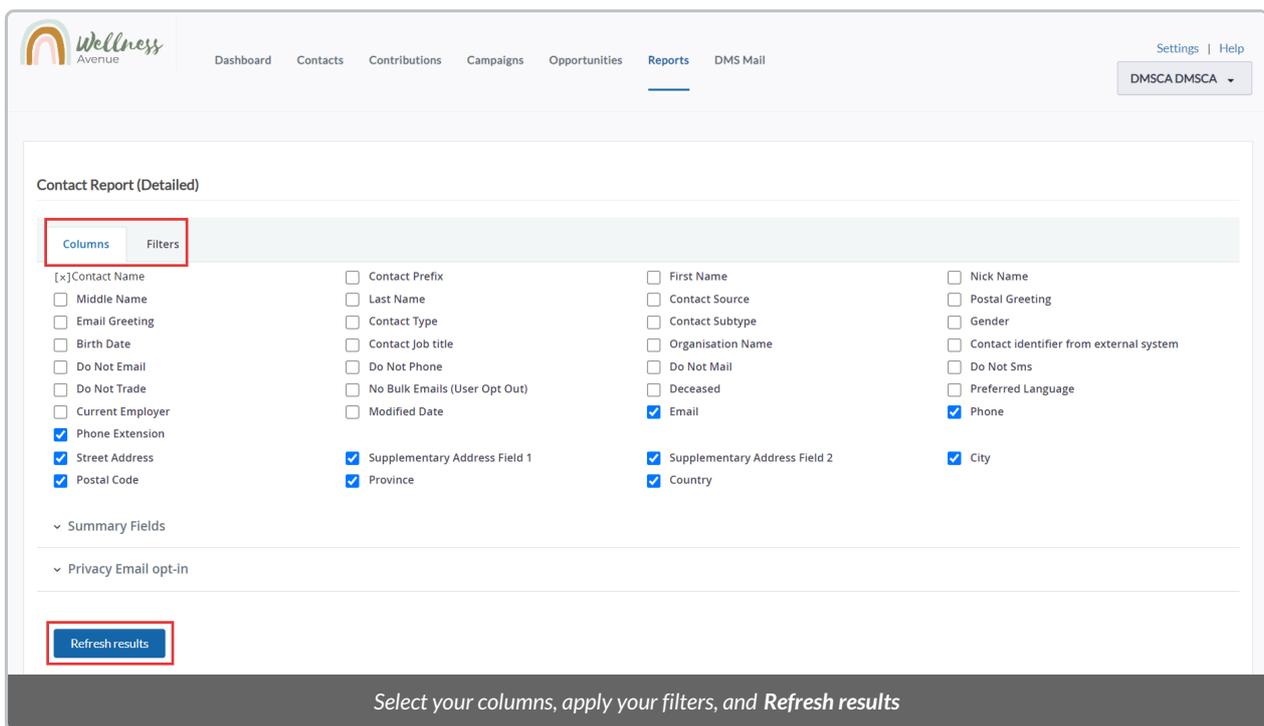
3. Select the Report Section to view the expanded list of Report options



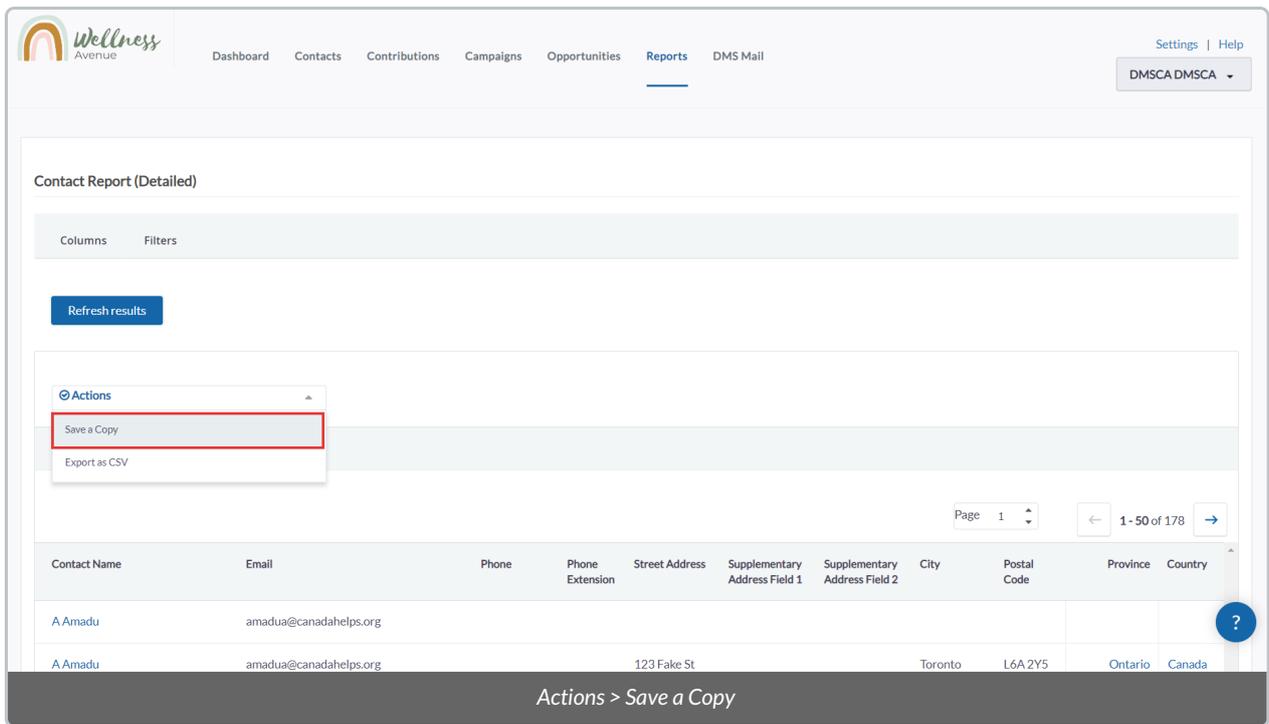
4. Select the Report you want to customize



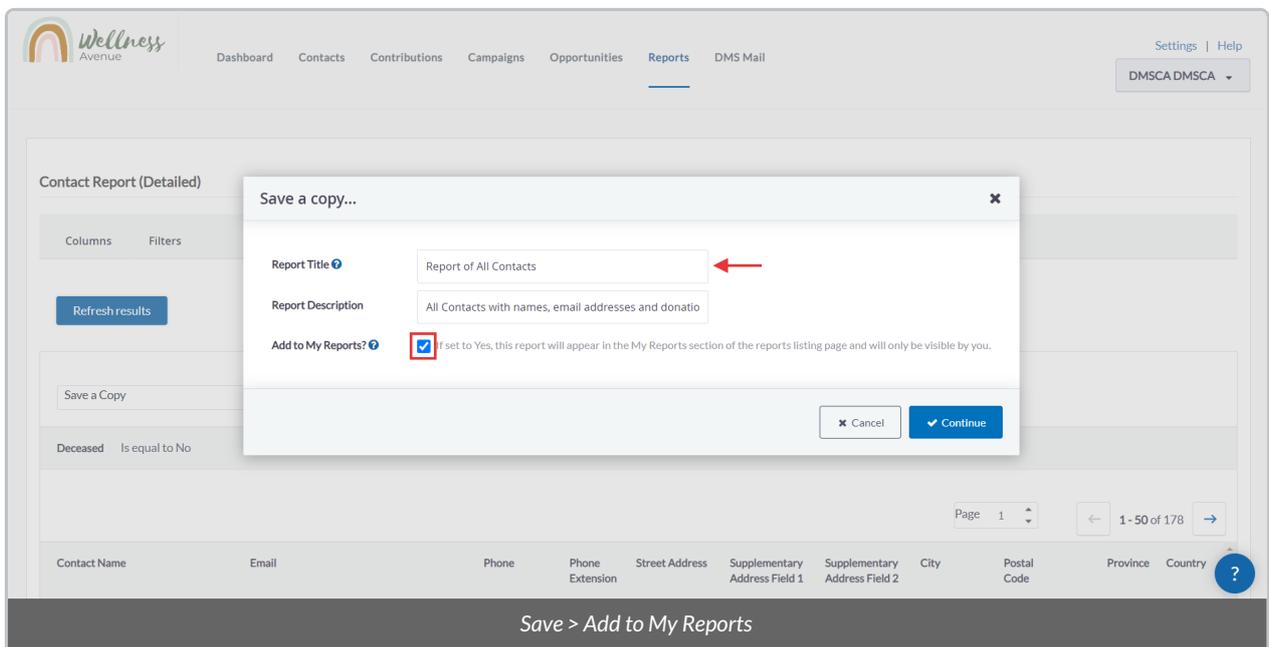
5. Apply any desired **Columns** or **Filters** and select **Refresh results** to generate the Report.



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



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.



**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.

### CanadaHelps DMS Reports

New Report

Contribution Reports

Contact Reports

Custom Contact Reports

My Custom Contact Report

All Contacts

View Results More

Contact Report (Detailed)

All Contacts

View Results More

Activity Report

All Activities excluding Contributions

View Results More

New Email Replies

All new email Replies

View Results More

Relationship Report

All Relationships between Contacts

View Results More

Opportunity Reports

To change the privacy restrictions of your custom Report, navigate back to the Report and select **Access**. Then, check or uncheck **Add to My Reports?**

### My Custom Report (Staff Member Donations)

Columns

Sorting

Filters

Title and Format

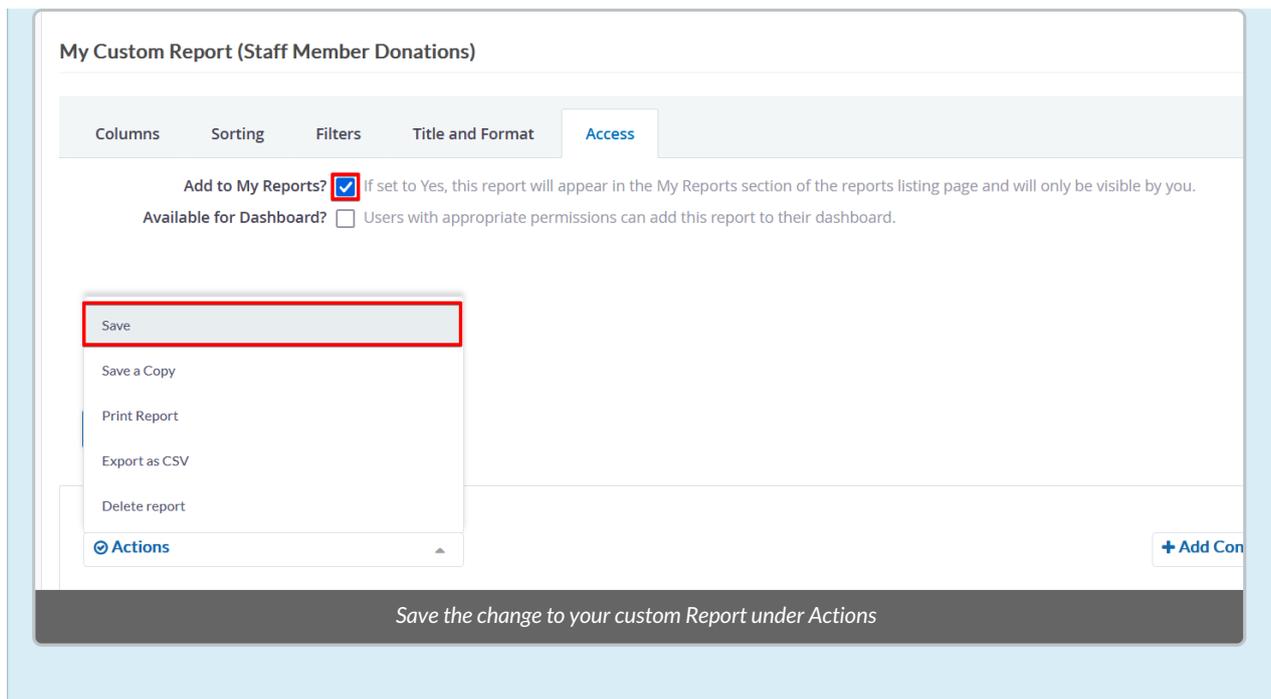
Access

**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 visible by you.

**Available for Dashboard?**  Users with appropriate permissions can add this report to their dashboard.

View results

Next, select **Actions** once again and **Save**.



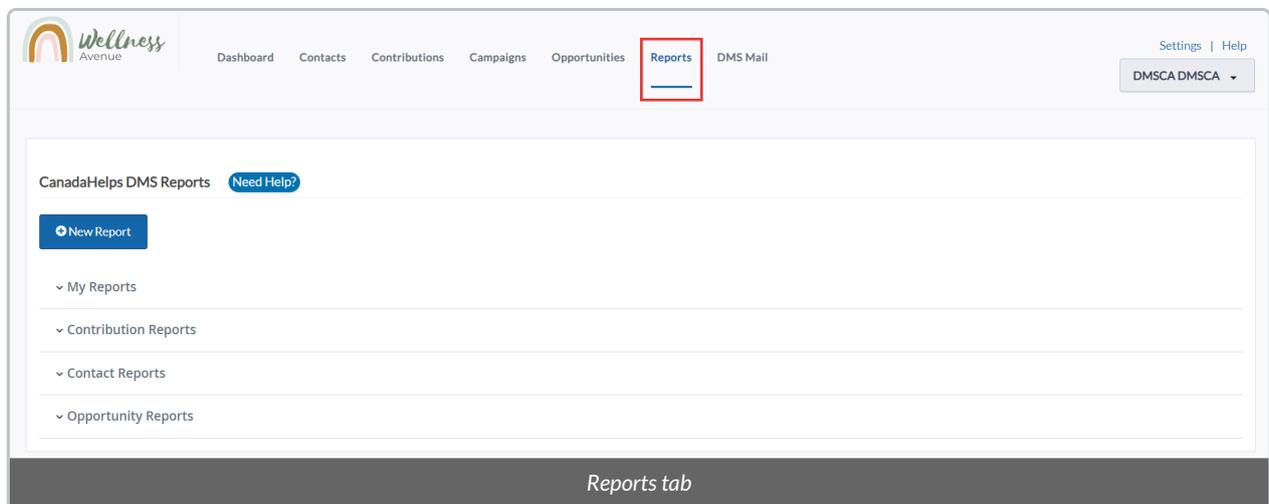
## Deleting Custom Reports

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](#)



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.

The screenshot shows the 'Wellness Avenue' Reports page. The navigation bar includes 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The 'Reports' section is active. Below the navigation, there is a 'CanadaHelps DMS Reports' section with a 'Need Help?' button and a 'New Report' button. A dropdown menu is open under 'My Reports', showing 'Contribution Reports' and 'Contact Reports'. Under 'Contribution Reports', 'Custom Contribution Reports' is highlighted. Under 'Contact Reports', 'Custom Contact Reports' is highlighted. A table lists various reports with 'View Results' and 'More' links. A 'Find your Custom Report' banner is at the bottom.

Report Name	Description	View Results	More
Contribution History by Source (Summary)	Total amounts raised by Source	View Results	More
Recurring Contributions (Summary)	Total amounts raised by Recurring Contributions with individual Contribution information	View Results	More
Receipts	Contributions by Receipt Number	View Results	More
Contact Report (Detailed)	All Contacts	View Results	More
Activity Report	All Activities excluding Contributions	View Results	More
New Email Replies	All new email Replies	View Results	More
Relationship Report	All Relationships between Contacts	View Results	More

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
Fiscal Year to Date	Total amounts raised this fiscal year by month	View Results More
Fiscal Year to Date (copy created by John Rainan on Dec 31st, 2021 12:18 PM)		View Results More
Last Year Inc. Today	Total amounts raised last calendar year by quarters	View Results More
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
GL Account & Payment Method Reconciliation Report (Full)	Shows Bookkeeping Transactions Report	View Results More
IATS Payments - Recurring Contributions Report		View Results More
SYBNT	Contributors who gave 'Some Year, But Not This'	View Results More
Contribution History by GL Account (Summary) [deprecated]	Overview of contributions by GL Account	View Results More
Contribution History by Recurring Contribution (Summary)	Overview of Recurring Contributions	View Results More
Customized Contribution History by Campaign (Summary)	Overview of Campaign contributions	View Results More
Contribution History by Fund (Detailed Contact)	In depth view of contributions by Fund	View Results More

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.

[Dashboard](#)
[Contacts](#)
[Contributions](#)
[Campaigns](#)
[Opportunities](#)
[Reports](#)
[DMS Mail](#)

[Settings](#) | [Help](#)

DMSCA DMSCA

CanadaHelps DMS Reports Need Help?

+ New Report

▼ My Reports

▼ Contribution Reports

^ Contact Reports

^ Custom Contact Reports

(Copy) Contact Report (Detailed)	All Organizations	View Results More
(Copy) Contact Report (Detailed)	All Contacts	View Results More
My Custom Contact Report	All Contacts	View Results More
(Copy) Activity Report	All Activities excluding Contributions	View Results More
All Inbound Email	All mail received through Inbound Mail Accounts	View Results More

Save a Copy

View as pdf

Print report

Export to csv

Delete report

More > Delete report

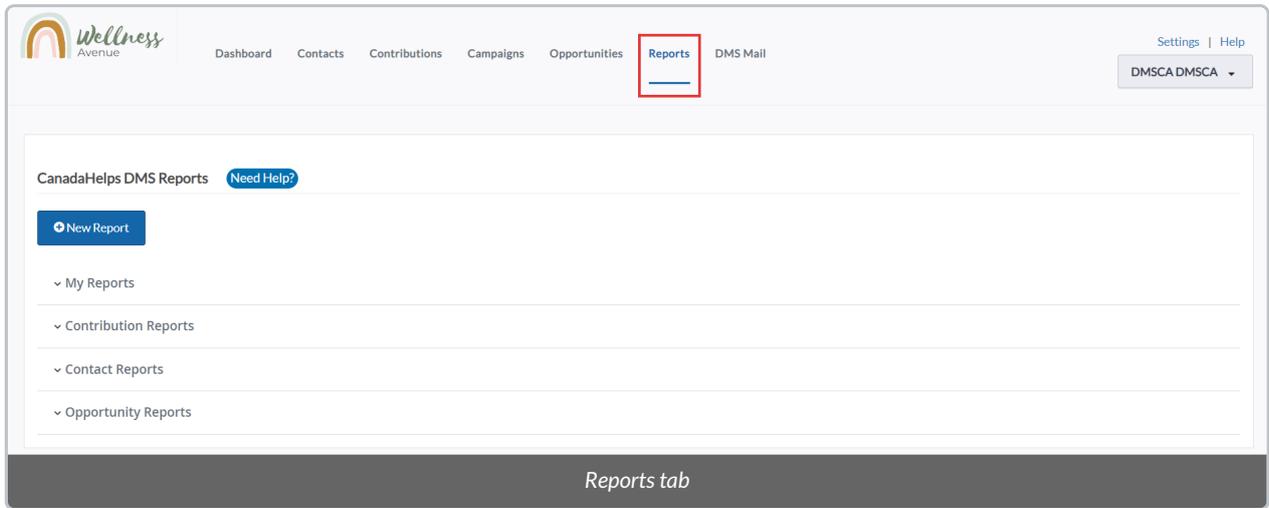
From the Report Details page

1. Visit the **Reports Tab**.

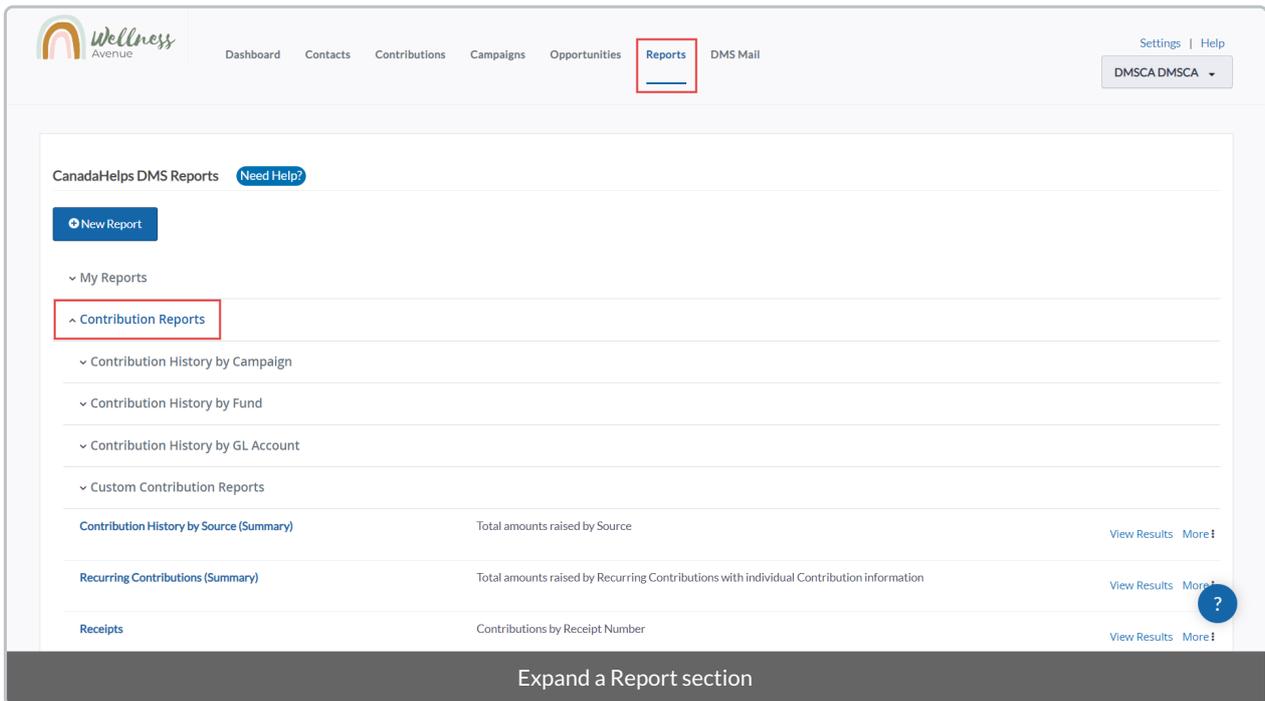
2. On the next page, you will see a list of our Standard Reports, organized by the following sections.

- **Contribution Reports**

- Contact Reports
- Opportunity Reports
- New Report Button



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



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

Wellness Avenue

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

Settings | Help

DMSCA DMSCA

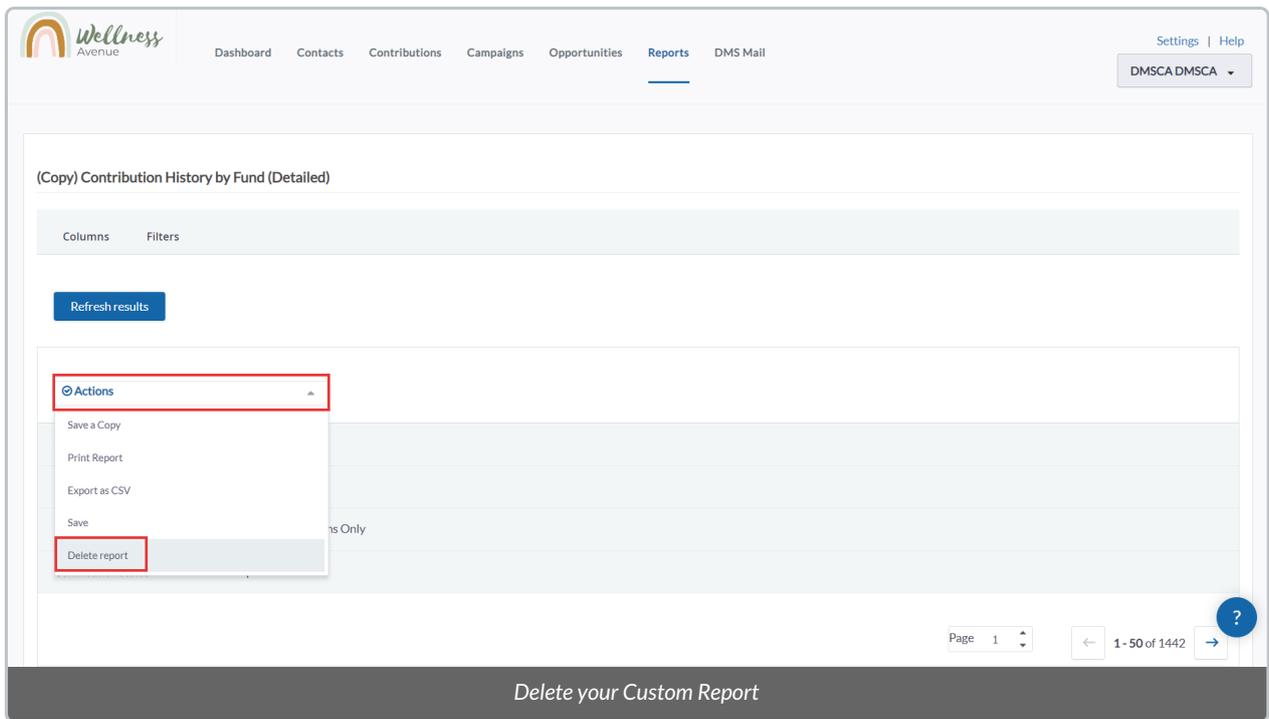
CanadaHelps DMS Reports [Need Help?](#)

[New Report](#)

- My Reports
- Contribution Reports
  - Contribution History by Campaign
  - Contribution History by Fund
  - Contribution History by GL Account
  - Custom Contribution Reports
  - Contribution History by Source (Summary) Total amounts raised by Source [View Results](#) [More](#)
  - Recurring Contributions (Summary) Total amounts raised by Recurring Contributions with individual Contribution information [View Results](#) [More](#)
  - Receipts Contributions by Receipt Number [View Results](#) [More](#)
- Contact Reports
  - Custom Contact Reports
  - Contact Report (Detailed) All Contacts [View Results](#) [More](#)
  - Activity Report All Activities excluding Contributions [View Results](#) [More](#)
  - New Email Replies All new email Replies [View Results](#) [More](#)
  - Relationship Report All Relationships between Contacts [View Results](#) [More](#)
- Opportunity Reports
  - Custom Contact Reports
  - Opportunity Report All Opportunities [View Results](#) [More](#)

[View Results](#)

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



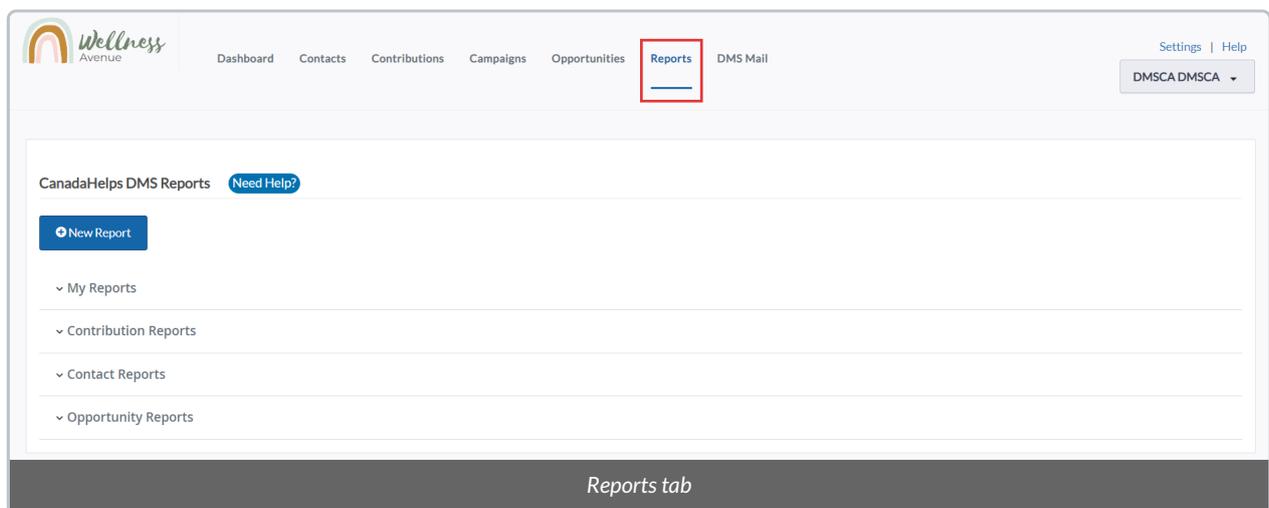
## Exporting Reports

From the Reports Tab (Export)

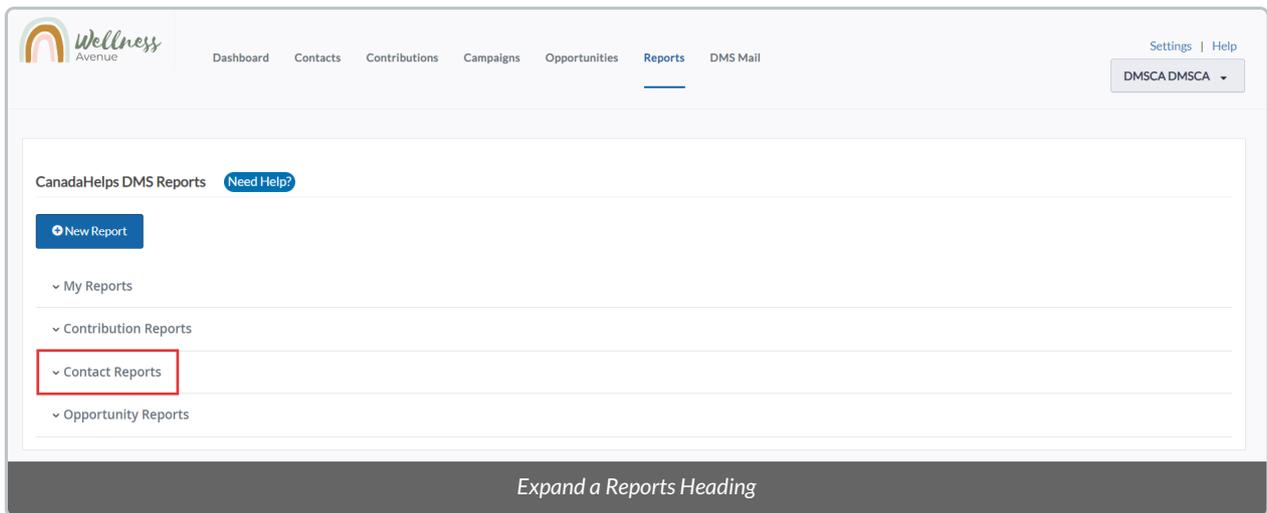
1. Visit the **Reports Tab**.

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

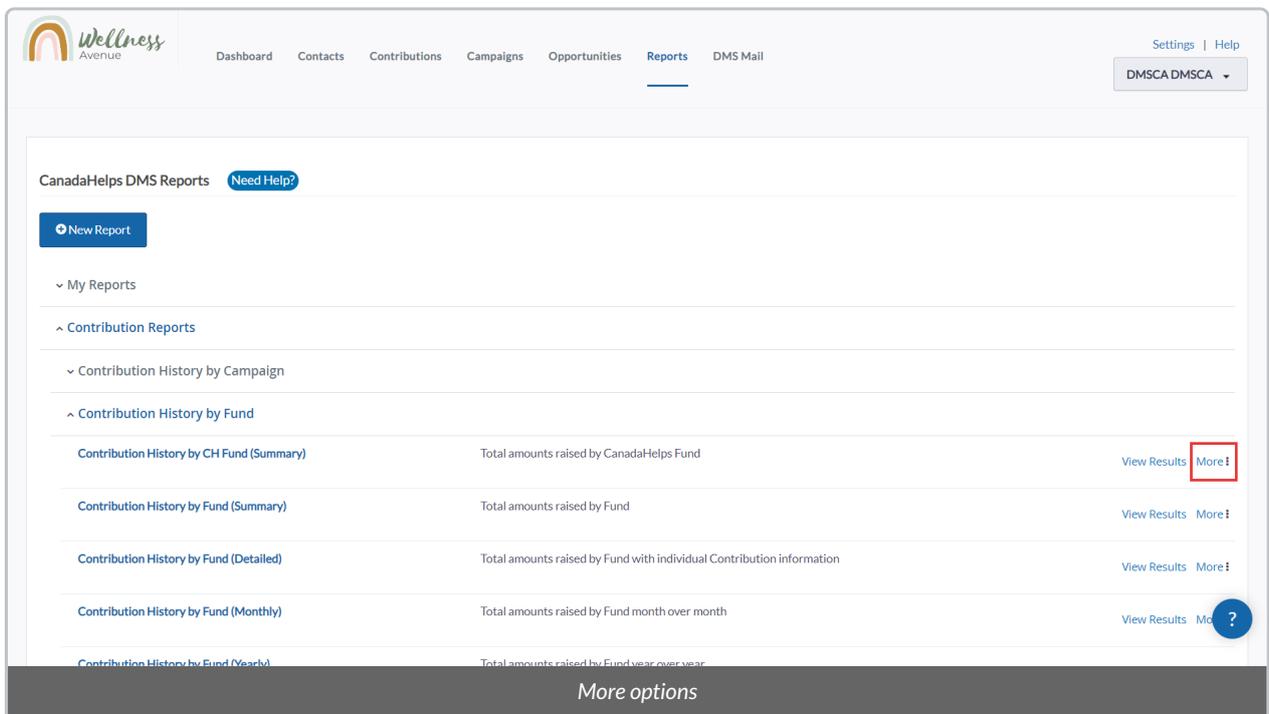
- [Contribution Reports](#)
- [Contact Reports](#)
- [Opportunity Reports](#)
- [New Report Button](#)



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



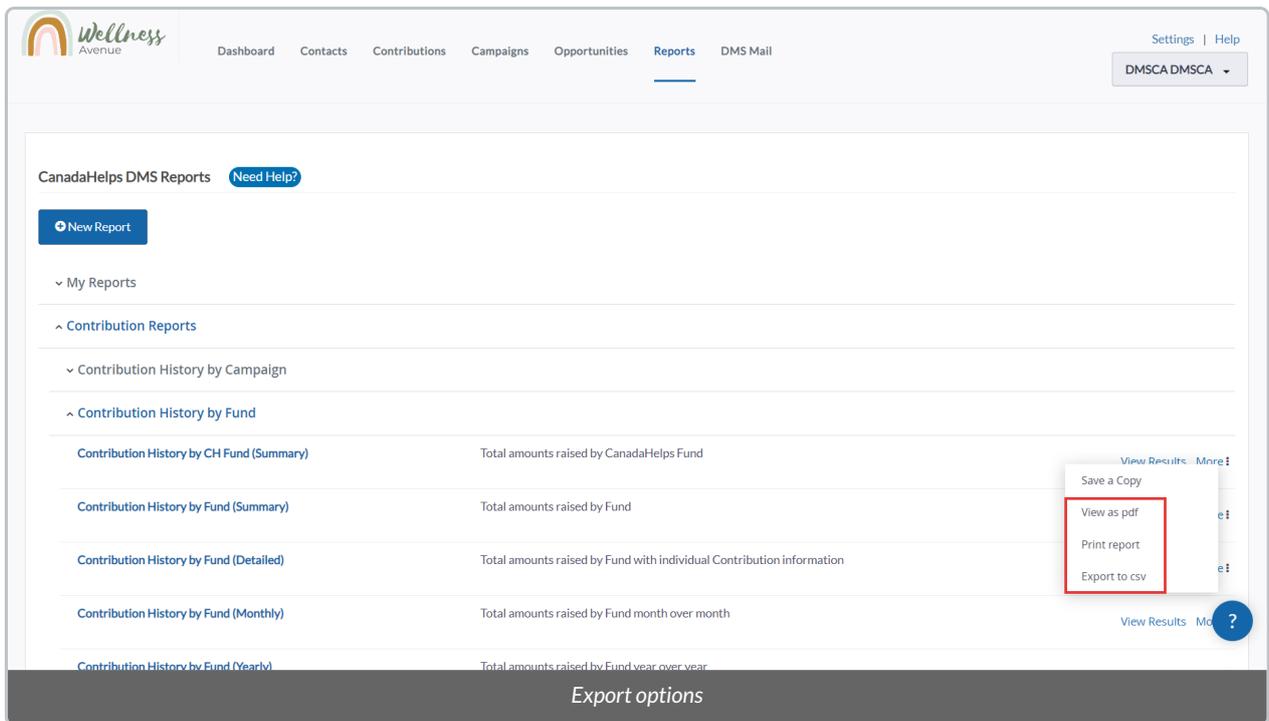
4. Select **More** on the right side of the specific Report you want to export



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.

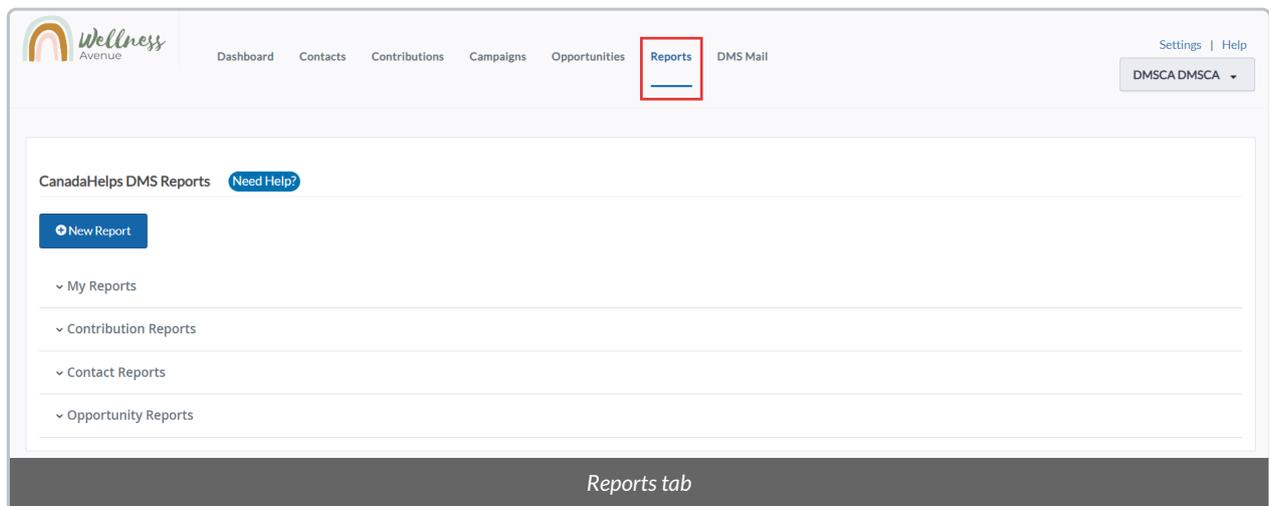


## From the Report Details page (Export)

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](#)



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 Reports

<b>Contribution History by Source (Summary)</b>	Total amounts raised by Source	<a href="#">View Results</a> <a href="#">More</a>
<b>Recurring Contributions (Summary)</b>	Total amounts raised by Recurring Contributions with individual Contribution information	<a href="#">View Results</a> <a href="#">More</a>
<b>Receipts</b>	Contributions by Receipt Number	<a href="#">View Results</a> <a href="#">More</a>

Expand a Report section

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

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 Reports

<b>Contribution History by Source (Summary)</b>	Total amounts raised by Source	<a href="#">View Results</a>	<a href="#">More</a>
<b>Recurring Contributions (Summary)</b>	Total amounts raised by Recurring Contributions with individual Contribution information	<a href="#">View Results</a>	<a href="#">More</a>
<b>Receipts</b>	Contributions by Receipt Number	<a href="#">View Results</a>	<a href="#">More</a>

Contact Reports

Custom Contact Reports

<b>Contact Report (Detailed)</b>	All Contacts	<a href="#">View Results</a>	<a href="#">More</a>
<b>Activity Report</b>	All Activities excluding Contributions	<a href="#">View Results</a>	<a href="#">More</a>
<b>New Email Replies</b>	All new email Replies	<a href="#">View Results</a>	<a href="#">More</a>
<b>Relationship Report</b>	All Relationships between Contacts	<a href="#">View Results</a>	<a href="#">More</a>

Opportunity Reports

Custom Contact Reports

<b>Opportunity Report</b>	All Opportunities	<a href="#">View Results</a>	<a href="#">More</a>
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[View Results](#)

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).

### Contribution History by Source (Summary)

Columns   Filters

Refresh results

⊙ Actions ▾

Save a Copy

Print Report

Export as CSV

Source	Number Of Contributions	Total Amount
	121	\$30,435.00
CanadaHelps	80	\$3,753.20
Cash Collection	3	\$10.50

Print or Export your Report