

Adding Custom Reports (New Reports)

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Donor Management System

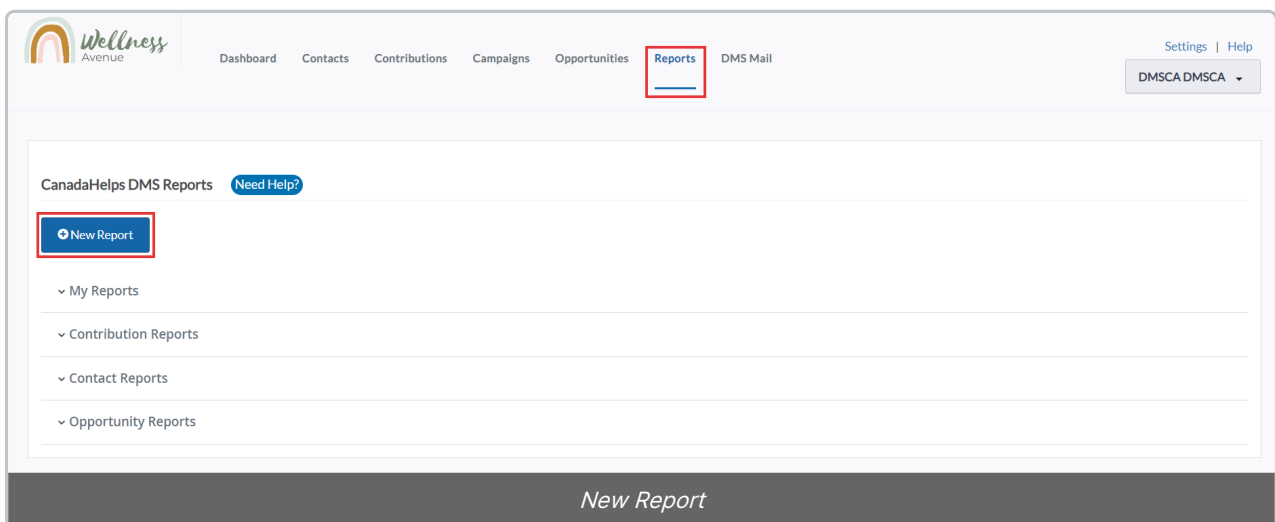
The DMS has Standard Reports that can be modified with [Filters](#) and [Columns](#), but your organization may require more unique and customizable Reports. This article will cover how you can customize Reports from a selection of **New Reports**.

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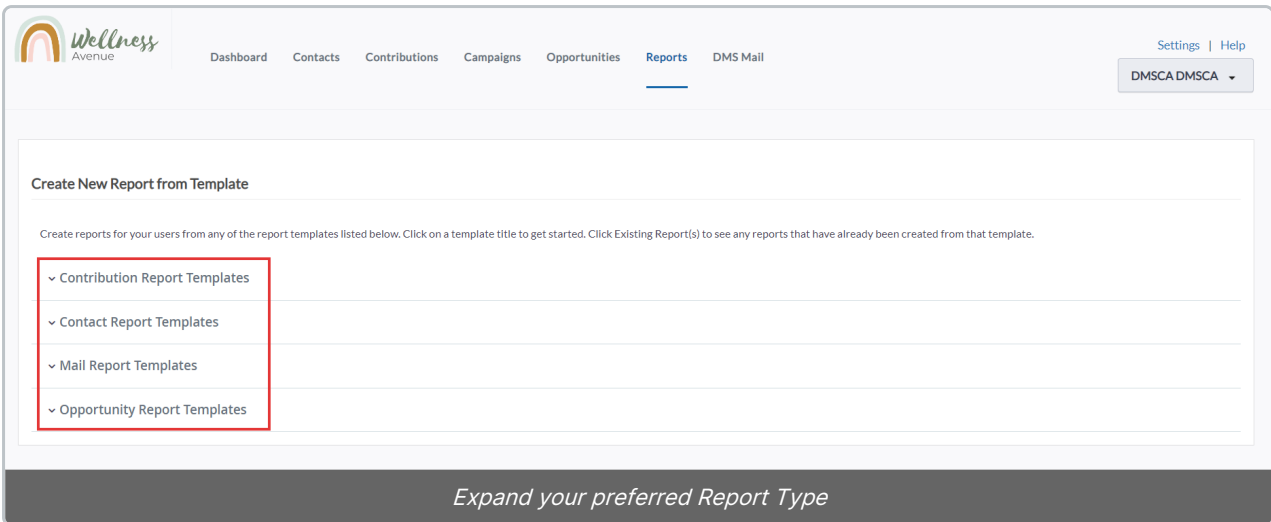
- [Adding a Custom Report](#)

Adding a Custom Report

1. Visit your **Reports Tab**
2. Select **New Report**

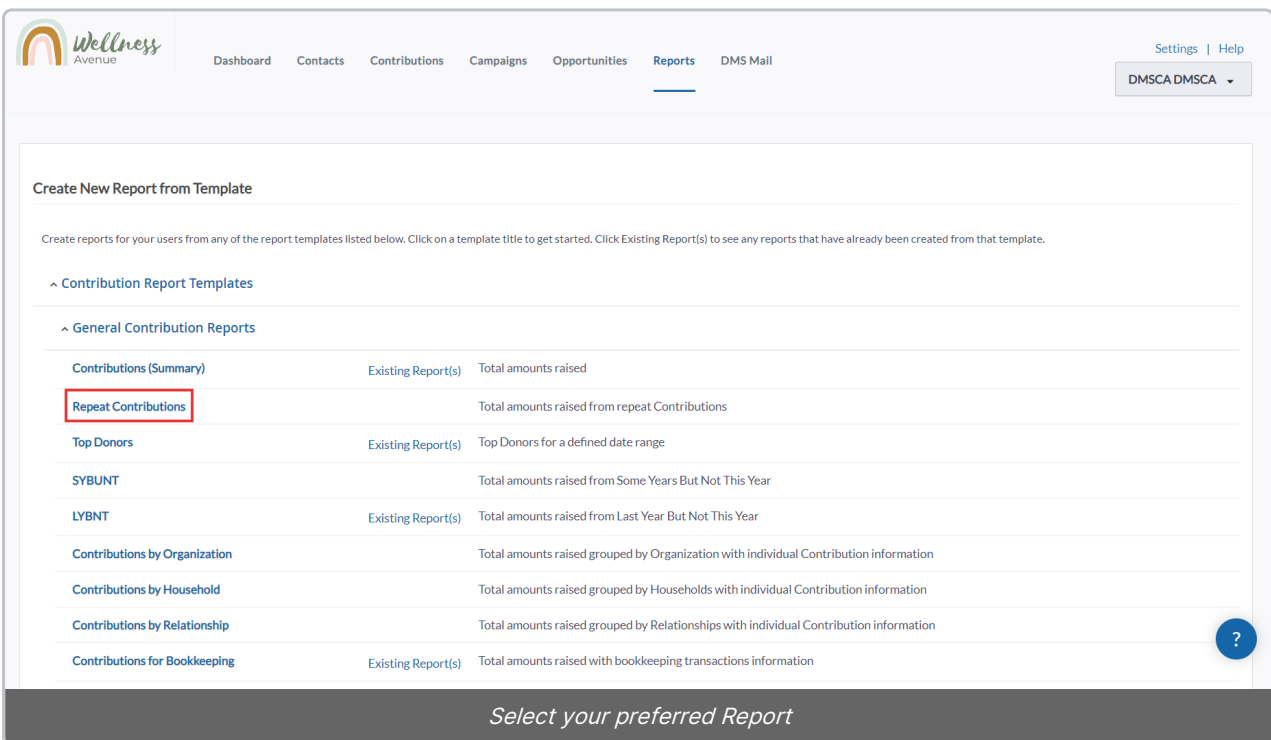


3. On the next page, **you will see a list of Report Templates** organized by *Contribution, Contact, Mail, and Opportunity*



4. **Select your desired Report Template section** to expand all of the Report Templates within it

5. **Select the name of the Report Template** you want to build your New Report from



Note: By selecting *Existing Report(s)*, you will see all the Reports that were created from that specific Report Template.

6. Depending on the Report you've selected, you may be able to **customize your New Report** with specific **Columns**, **Sorting**, and **Filters**. After customizing your New Report, select **View Results**.

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Repeat Contributions - Template

Columns | Sorting | Filters

- Contact Name
- Middle Name
- Postal Greeting
- Contact Subtype
- Contact Job title
- Do Not Phone
- No Bulk Emails (User Opt Out)
- Contact ID
- Fund
- Address Name
- Supplementary Address Field 3
- City
- Province
- Contact Prefix
- Last Name
- Email Greeting
- Gender
- Organisation Name
- Do Not Mail
- Deceased
- Email
- Contribution Source
- Street Address
- Street Number
- Postal Code
- County
- First Name
- Contact Suffix
- Addressee
- Birth Date
- Contact identifier from external system
- Do Not Sms
- Preferred Language
- Phone
- [x]Range One Stat
- Supplementary Address Field 1
- Street Name
- Post Code Suffix
- Nick Name
- Contact Source
- Contact Type
- Age
- Do Not Email
- Do Not Trade
- Current Employer
- [x]Range Two Stat
- Supplementary Address Field 2
- Street Unit
- Country

Summary Fields

Privacy Email opt-in

View results

Customize Columns, Sorting, Filters, and select View Results

7. Once satisfied with your New Report, select **Actions** and then **Save a Copy**

Wellness Avenue | Dashboard | Contacts | **Contributions** | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Repeat Contributions - Template

Columns | Sorting | Filters | Title and Format | Access

Refresh results

Actions

- Create Report
- Save a Copy**
- Print Report
- Export as CSV

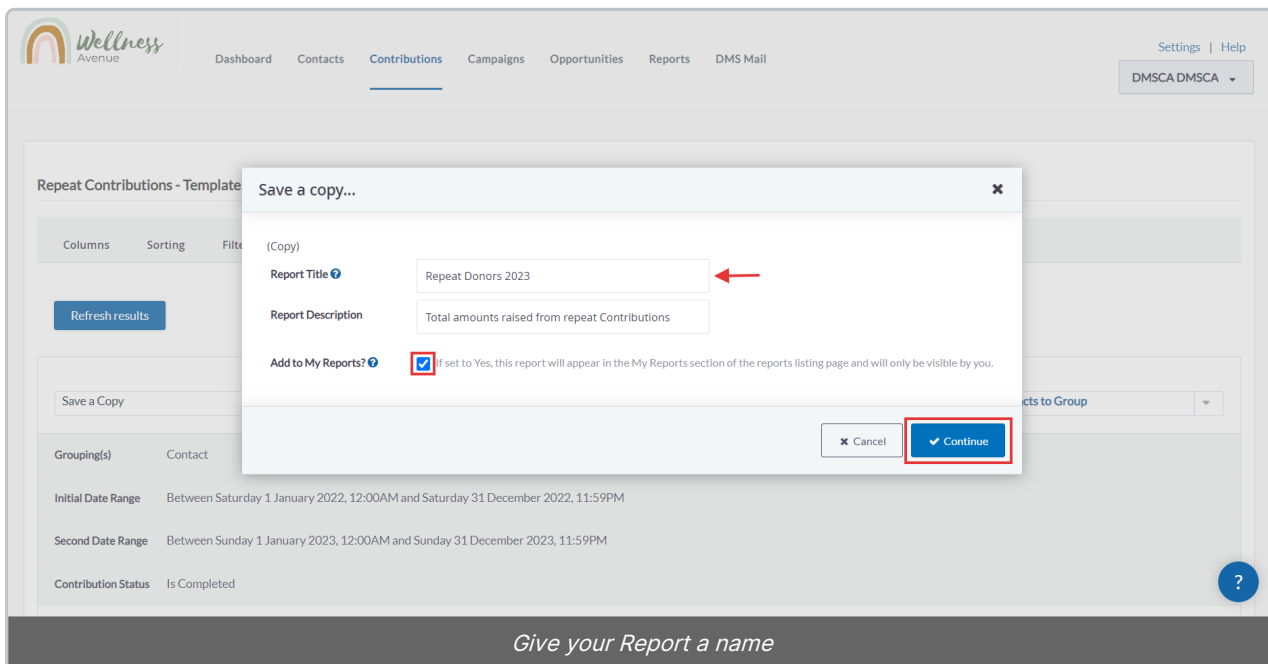
Contribution Status: Is Completed

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| 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 |

Save a Copy

8. Give your new Report a **Report Title**. You can also choose to add this Report to your **My Reports** section for easy access. When ready, select **Continue**.



9. If you've added your Report to your **My Reports** tab, you'll see it under this heading. Otherwise, it will be saved in under the **Custom Reports subsection** of either the Contribution, Contact, or Opportunity heading (depending on what type of report was generated).

