

Adding Custom Reports (New Reports)

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Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

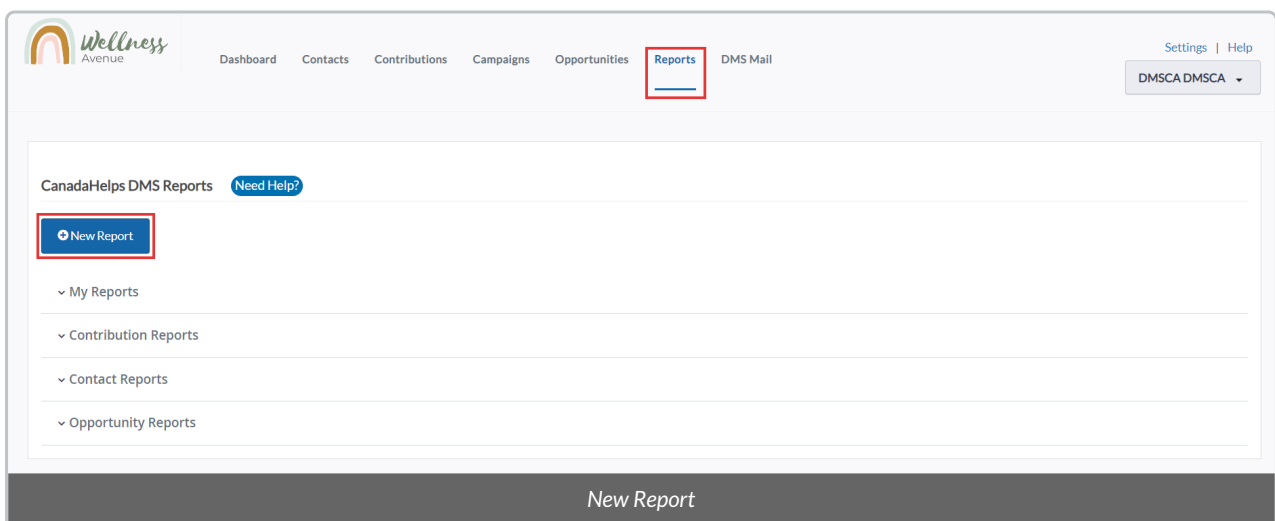
The DMS has Standard Reports that can be modified with [Filters](#) and [Columns](#), but your organization may require more unique and customizable Reports. This article will cover how you can customize Reports from a selection of **New Reports**.

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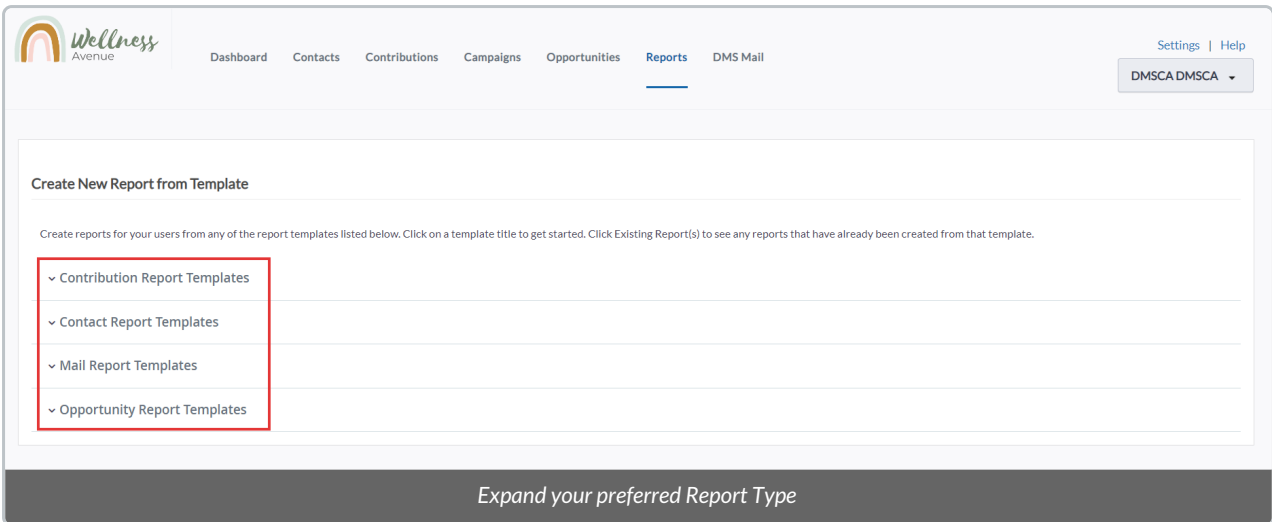
- [Adding a Custom Report](#)

Adding a Custom Report

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

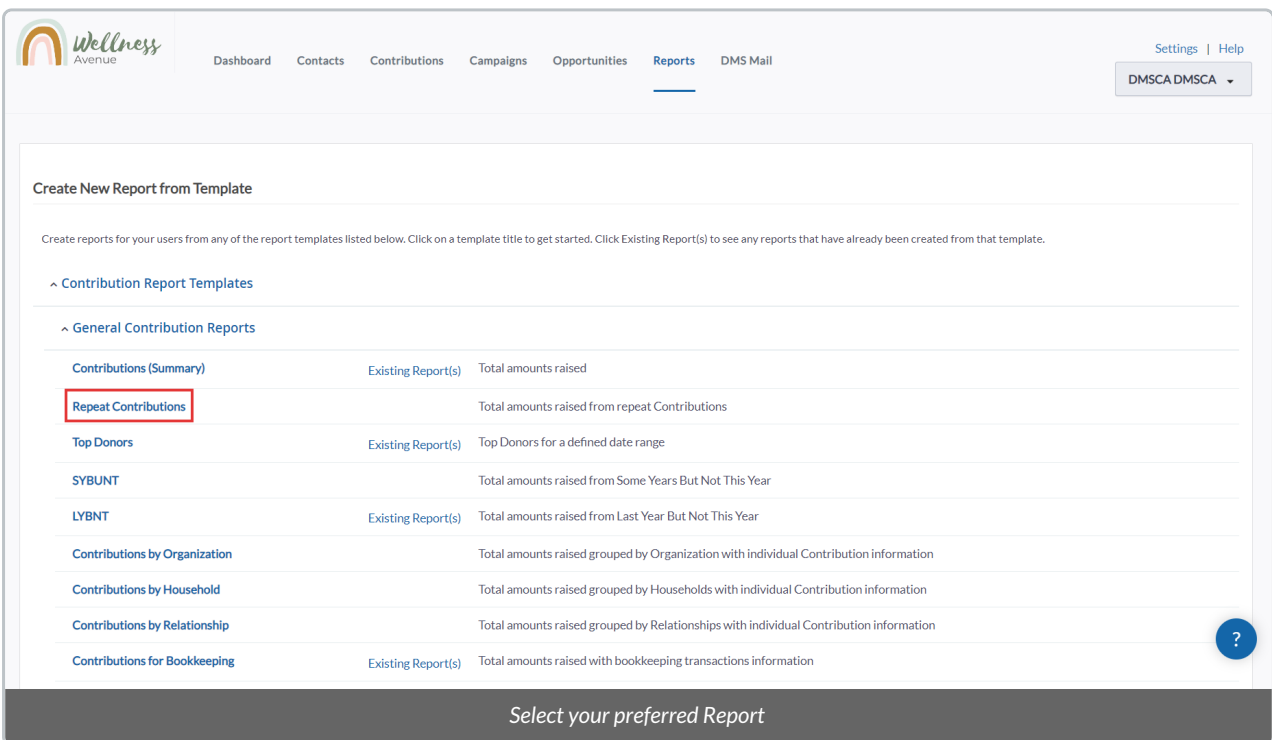


3. On the next page, you will see a list of **Report Templates** organized by *Contribution, Contact, Mail, and Opportunity*



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 | + Add Contacts to Group

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

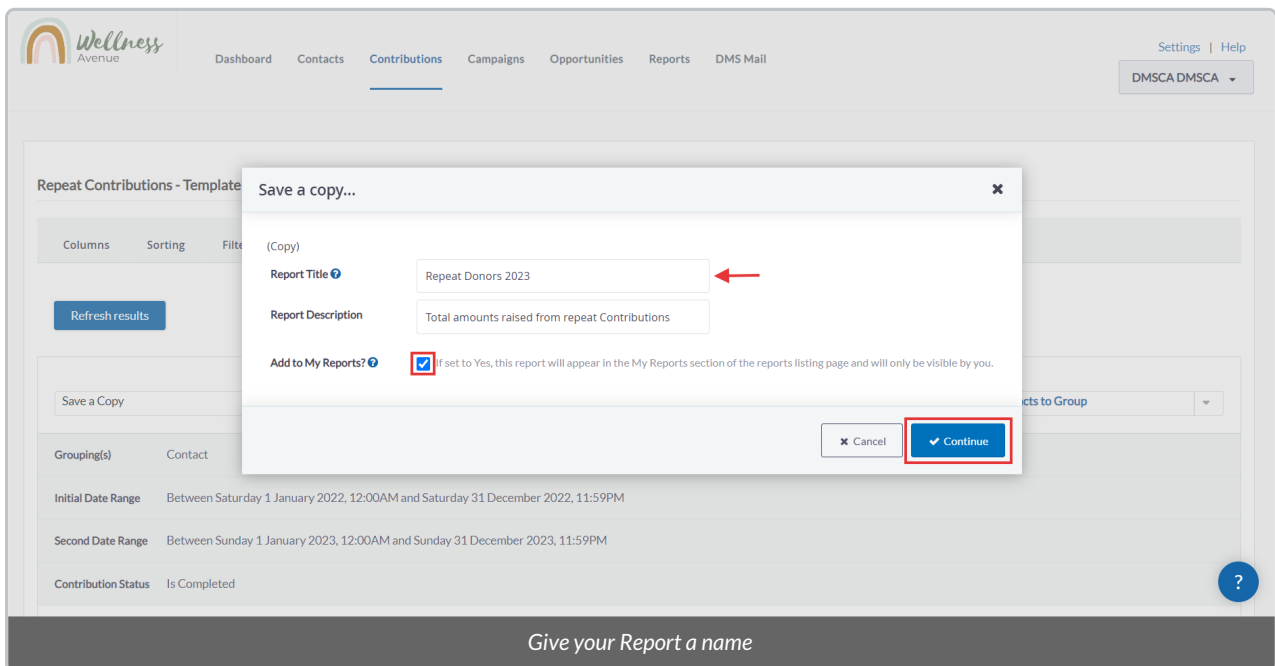
Contribution Status: Is Completed

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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).

