Adding Custom Reports (New Reports)

Donor Management System

Want to learn more about this feature?

Watch our Training Webinars here
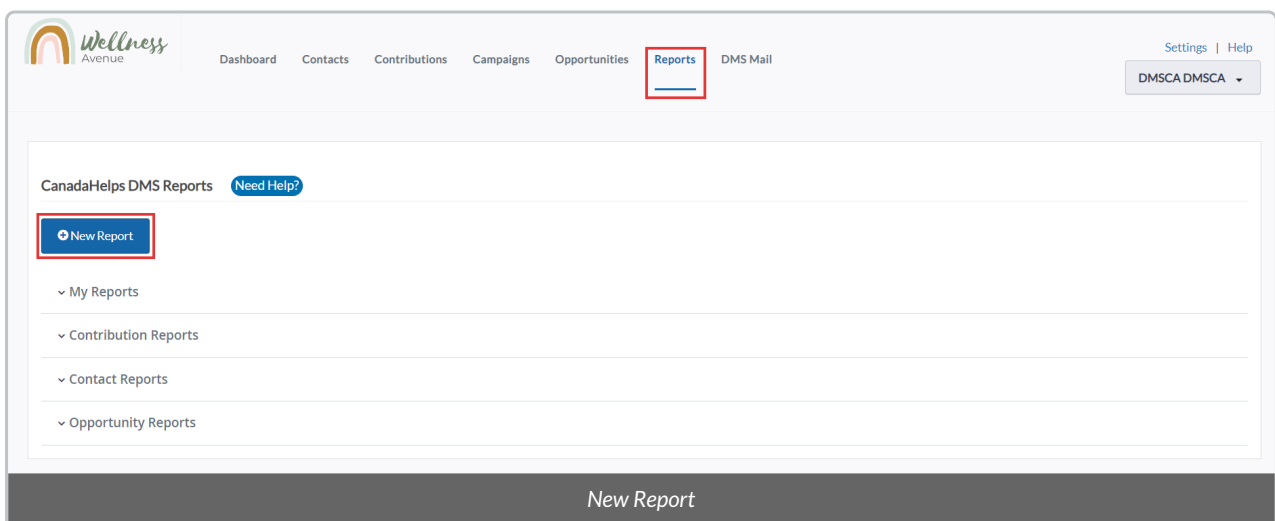
The DMS has Standard Reports that can be modified with Filters and Columns, but your organization may require more unique and customizable Reports. This article will cover how you can customize Reports from a selection of **New Reports.**
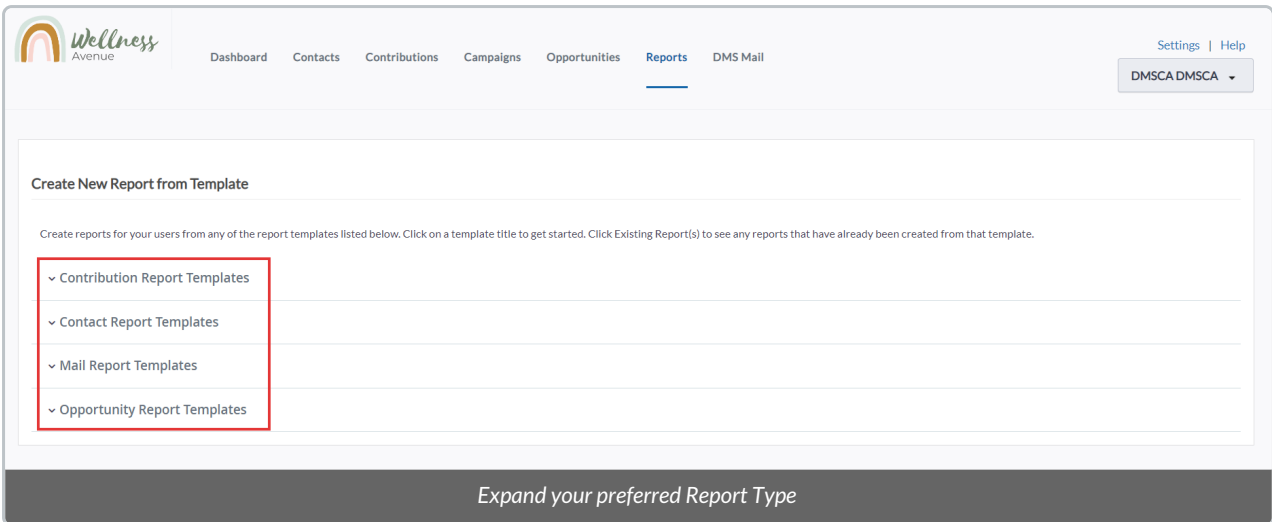
Table of Contents:

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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*

Expand your preferred Report Type

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

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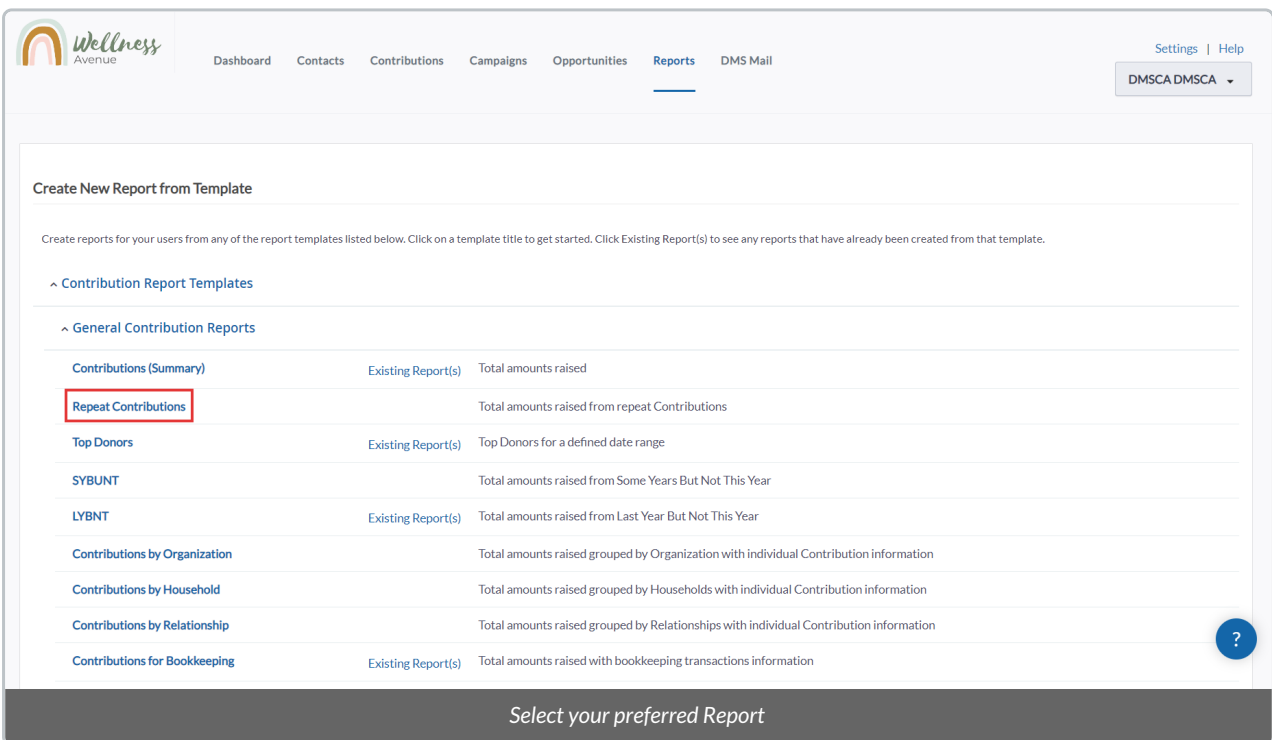
Note: By selecting *Existing Report(s)*, you will see all the Reports that were created from that specific Report Template.

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.*

Customize Columns, Sorting, Filters, and select View Results

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

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.*

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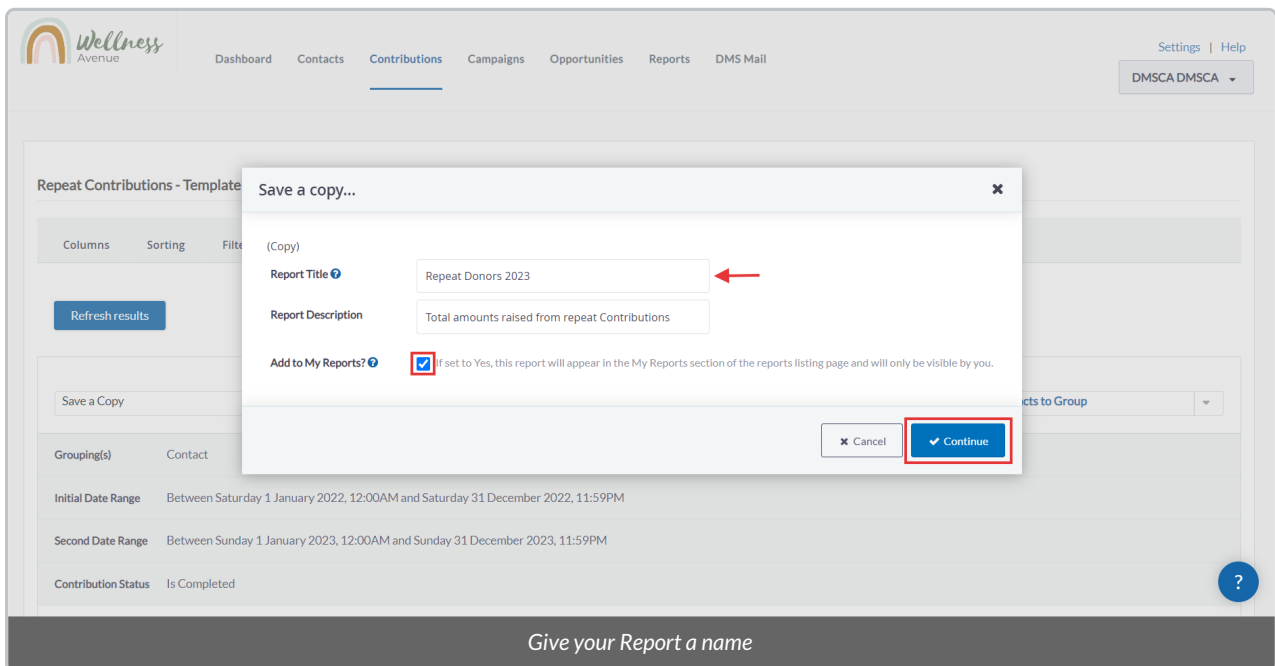
9. If you've added your Report to your *My Reports* tab, you'll see it under this heading. Otherwise, it will be saved in under the **Custom Reports subsection** of either the Contribution, Contact, or Opportunity heading (depending on what type of report was generated).

Expand your preferred Custom Reports heading to access Saved Reports