

Adding Charts to Reports

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Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

Within the **Reports Tab**, you will be able to generate certain Custom Reports in **Bar Chart** and **Pie Chart** form.

Learn more:

- [Reports Tab Overview](#)
- [Adding Custom Reports](#)

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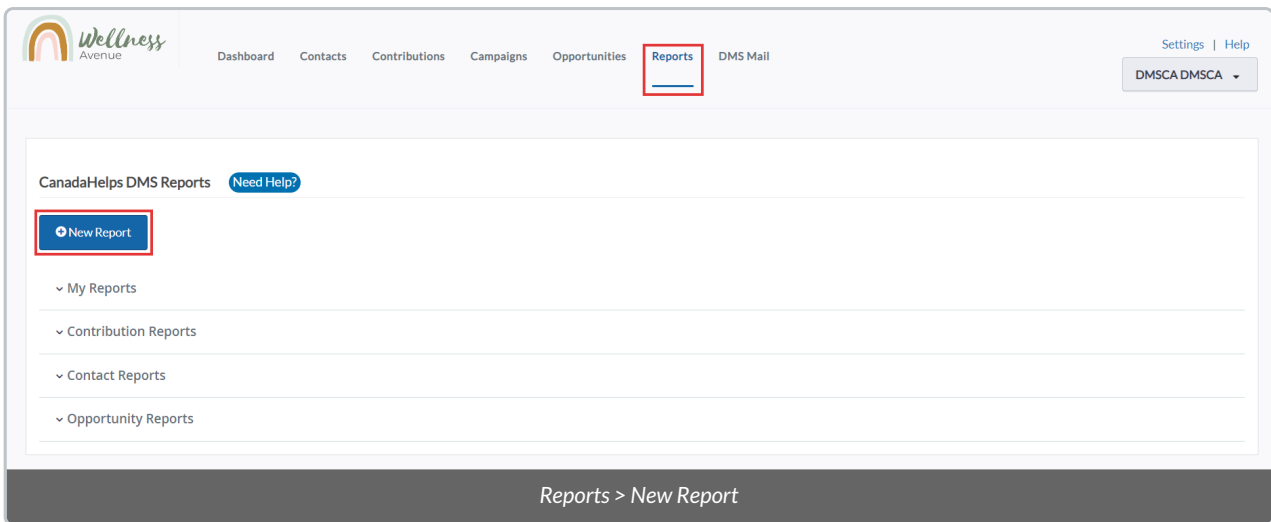
Considerations

You can only generate Charts for the following Summarized Reports:

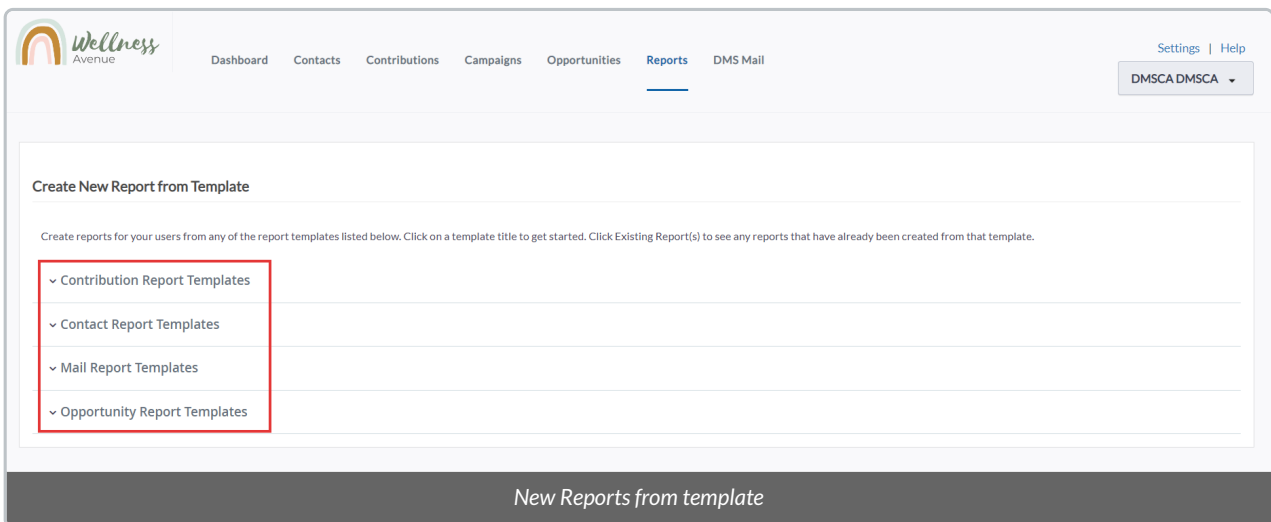
- Contribution Summary Report
- SYBUNT Report
- Extended Contribution Summary Report
- Mail Bounce Report
- Mail Summary Report
- Mail Opened Report
- Mail Click-Through Report

Adding a Chart to a Report

1. In the Reports Tab, select **New Report**



2. Select your desired Report Template section to expand all of the available Report Templates associated with the section.



3. Select from one of the New Reports mentioned above (see: [Considerations](#))

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

Settings | Help

DMSCA DMSCA

Create New Report from Template

Create reports for your users from any of the report templates listed below. Click on a template title to get started. Click Existing Report(s) to see any reports that have already been created from that template.

^ Contribution Report Templates

^ General Contribution Reports

Contributions (Summary)	Existing Report(s)	Total amounts raised
Repeat Contributions	Existing Report(s)	Total amounts raised from repeat Contributions
Top Donors	Existing Report(s)	Top Donors for a defined date range
SYBUNT		Total amounts raised from Some Years But Not This Year
LYBNT	Existing Report(s)	Total amounts raised from Last Year But Not This Year
Contributions by Organization		Total amounts raised grouped by Organization with individual Contribution information
Contributions by Household		Total amounts raised grouped by Households with individual Contribution information
Contributions by Relationship		Total amounts raised grouped by Relationships with individual Contribution information
Contributions for Bookkeeping	Existing Report(s)	Total amounts raised with bookkeeping transactions information
Contributions (Detailed)	Existing Report(s)	Total amounts raised with individual Contribution information
Contributions for Bookkeeping (Detailed)	Existing Report(s)	Total amounts raised with bookkeeping transactions information

^ Recurring Contribution Reports

^ Receipt Reports

^ Contact Report Templates

^ Mail Report Templates

Mail Bounces		All Mailings with Bounce activity
Mail (Summary)	Existing Report(s)	All DMS Mailings statistics
Mail Opened	Existing Report(s)	All Contacts who opened emails from a Mailing
Mail Click-Through		All Mailings and Clicks Tracking
Mail (Detailed)		All Mailings with detailed information

^ Opportunity Report Templates

Select from one of the applicable New Reports

4. Within your selected Report Template, you can modify **Columns** to change the type of information you will view in your Chart:

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Contributions (Summary) - Template

Columns | Sorting | Filters

<input checked="" type="checkbox"/> Contact Name	<input type="checkbox"/> Contact Prefix	<input type="checkbox"/> First Name	<input type="checkbox"/> Nick Name
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Contact Suffix	<input type="checkbox"/> Contact Source
<input type="checkbox"/> Postal Greeting	<input type="checkbox"/> Email Greeting	<input type="checkbox"/> Addressee	<input type="checkbox"/> Contact Type
<input type="checkbox"/> Contact Subtype	<input type="checkbox"/> Gender	<input type="checkbox"/> Birth Date	<input type="checkbox"/> Age
<input type="checkbox"/> Contact Job title	<input type="checkbox"/> Organisation Name	<input type="checkbox"/> Contact identifier from external system	<input type="checkbox"/> Do Not Email
<input type="checkbox"/> Do Not Phone	<input type="checkbox"/> Do Not Mail	<input type="checkbox"/> Do Not Sms	<input type="checkbox"/> Do Not Trade
<input type="checkbox"/> No Bulk Emails (User Opt Out)	<input type="checkbox"/> Deceased	<input type="checkbox"/> Preferred Language	<input type="checkbox"/> Current Employer
<input type="checkbox"/> Contact ID	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Phone	
<input checked="" type="checkbox"/> Fund	<input type="checkbox"/> Contribution Status	<input type="checkbox"/> Source	<input type="checkbox"/> Campaign
<input checked="" type="checkbox"/> Contribution Amount Stats	<input type="checkbox"/> Non-deductible Amount	<input type="checkbox"/> Contribution Recurring	<input type="checkbox"/> Campaign Group
<input type="checkbox"/> Batch Title	<input type="checkbox"/> Soft Credit Amount Stats		
<input type="checkbox"/> Credit Card Type			
<input type="checkbox"/> Address Name	<input type="checkbox"/> Street Address	<input type="checkbox"/> Supplementary Address Field 1	<input type="checkbox"/> Supplementary Address Field 2
<input type="checkbox"/> Supplementary Address Field 3	<input type="checkbox"/> Street Number	<input type="checkbox"/> Street Name	<input type="checkbox"/> Street Unit
<input type="checkbox"/> City	<input type="checkbox"/> Postal Code	<input type="checkbox"/> Post Code Suffix	<input checked="" type="checkbox"/> Country
<input type="checkbox"/> Province	<input type="checkbox"/> County		

Additional info
 Contribution Details
 Dedication Information
 Custom Question
 Summary Fields

<input checked="" type="checkbox"/> Total Lifetime Contributions	<input type="checkbox"/> Amount of last contribution	<input type="checkbox"/> Date of Last Contribution	<input type="checkbox"/> Date of First Contribution
<input type="checkbox"/> Largest Contribution	<input type="checkbox"/> Count of Contributions		

Privacy Email opt-in

[View results](#)

Choose your Report columns

5. In addition, you can modify:

- **Filters** (i.e. filter by This Fiscal Year):

Contributions (Summary) - Template

Columns	Sorting	Filters
Date Received	Any	
Receipt Date	Any	
Contribution Status	Is one of	Completed
Campaign	Is one of	- select -
Fund	Is one of	- select -
Contribution Amount	Is less than or equal to	
Non-deductible Amount	Is less than or equal to	
Contribution Aggregate	Is less than or equal to	
Contribution Count	Is less than or equal to	
Campaign Group	Is one of	- select -
Contribution Source	Is one of	- select -
Payment Method	Is one of	- select -

Reports Date Filter

- and **Sorting** (i.e. sort by Ascending order):

Contribution Summary Report - Template

Columns	Sorting	Filters
Column	Order	Section Header / Group By
- none -	Ascending	<input type="checkbox"/>

Sort in Ascending Order

6. Next, select **View Results** and you will automatically be taken to the standard **Tabular Chart**, segmented by the Columns you have selected.

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

Settings | Help

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Contributions (Summary) - Template

Columns Sorting Filters Title and Format Access

Refresh results

Actions Existing report(s) from this template

Tabular VIEW

+ Add Contacts to Group

Grouping(s) Date Received & Contribution Status

Date Received Between Saturday 1 January 2022, 12:00AM and Saturday 31 December 2022, 11:59PM

Contribution Status Is Completed

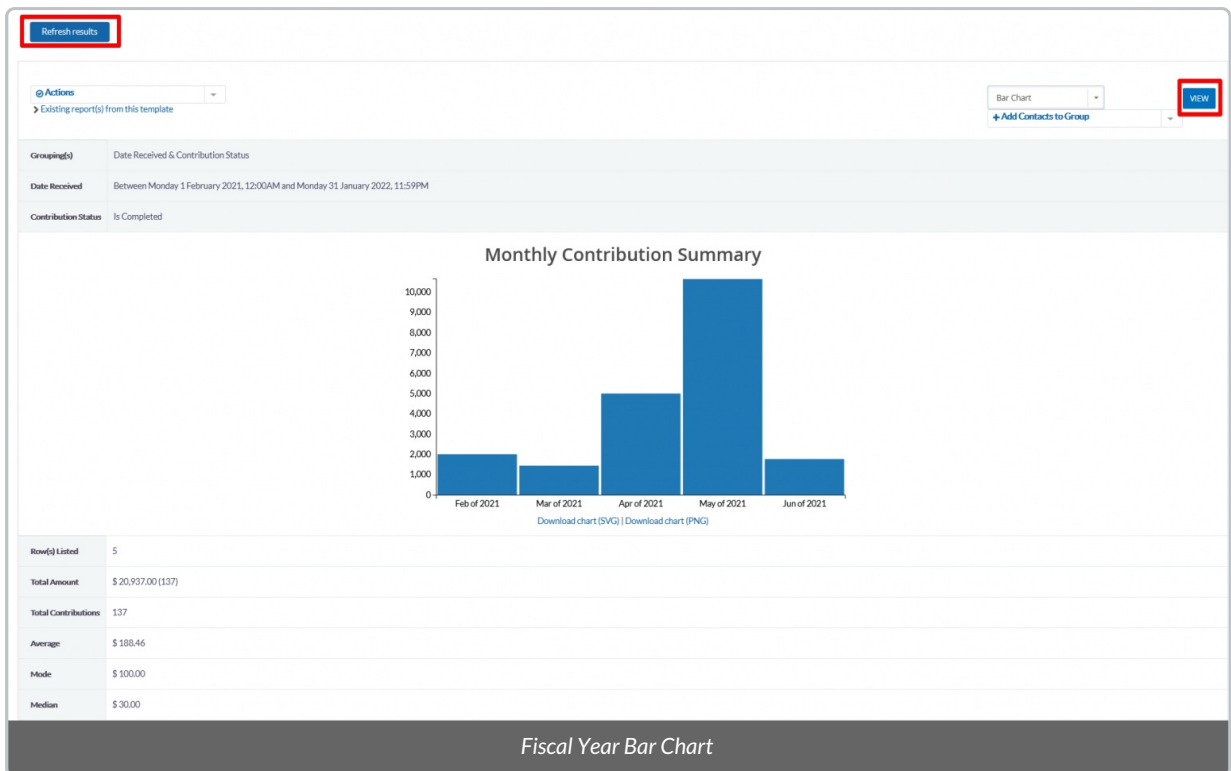
Contact Name	Email	Fund	Month Beginning	Number Of Contributions	Total Amount	Total Lifetime Contributions
Anderson Ada	anderson.a@test.com	General Fund	January 2022	8	\$2,554.00	9,955.00
Anderson Ada	anderson.a@test.com	General Fund	February 2022	3	\$675.00	9,955.00
Anderson Ada	anderson.a@test.com	General Fund	March 2022	13	\$1,409.89	9,955.00
Alex Fergie	jubino+woodcoaster@canadahelps.org	General Fund	April 2022	18	\$15,391.00	25,057.00

Report in Tabular mode

7. To view a **Bar Chart** or **Pie Chart**, select your desired Chart view from the drop-down menu and select **View**.

- Summary information will be displayed beneath the Chart, including **Total Amount**, **Total Contributions**, and **Average Contribution**.

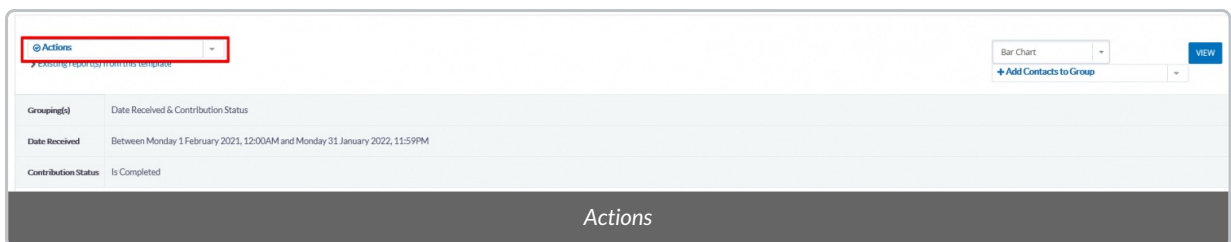
Note: This Chart has been filtered by **Date Received: This Fiscal Year**.



Note: This Chart has been filtered by **Date Received: This Fiscal Year.**

8. Now that you have generated your preferred Chart, you can perform a set of **Actions**, including:

- Create Report
- Save a Copy
- Print Report
- Export as .csv File



9. You will also be able to save this report to your Home Tab as a customized **Dashlet**.