# Adding Charts to Reports

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**Donor Management System**

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

Table of Contents:


- Considerations
- Adding a Chart to a Report

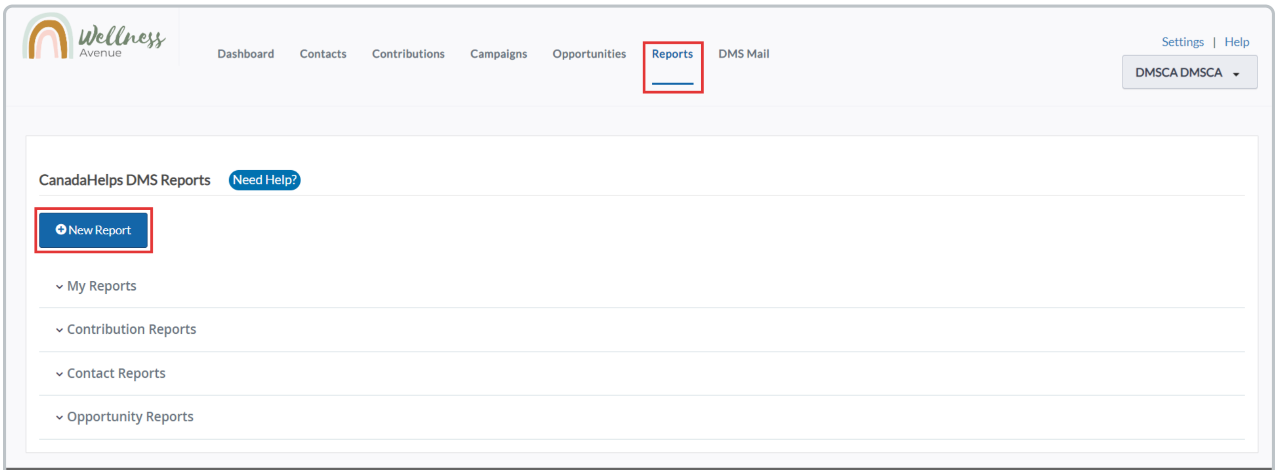

## Considerations

**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

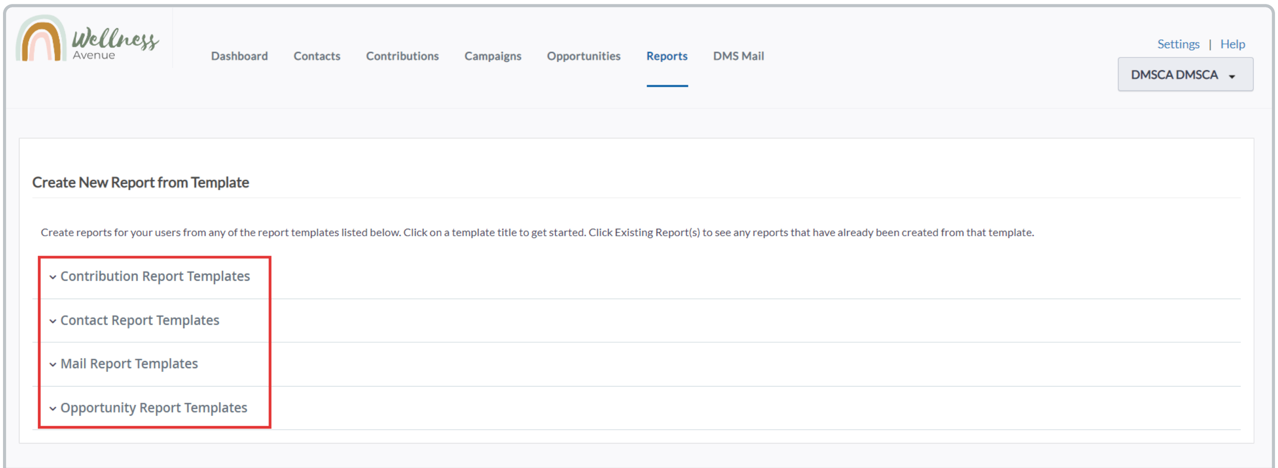
## Adding a Chart to a Report

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



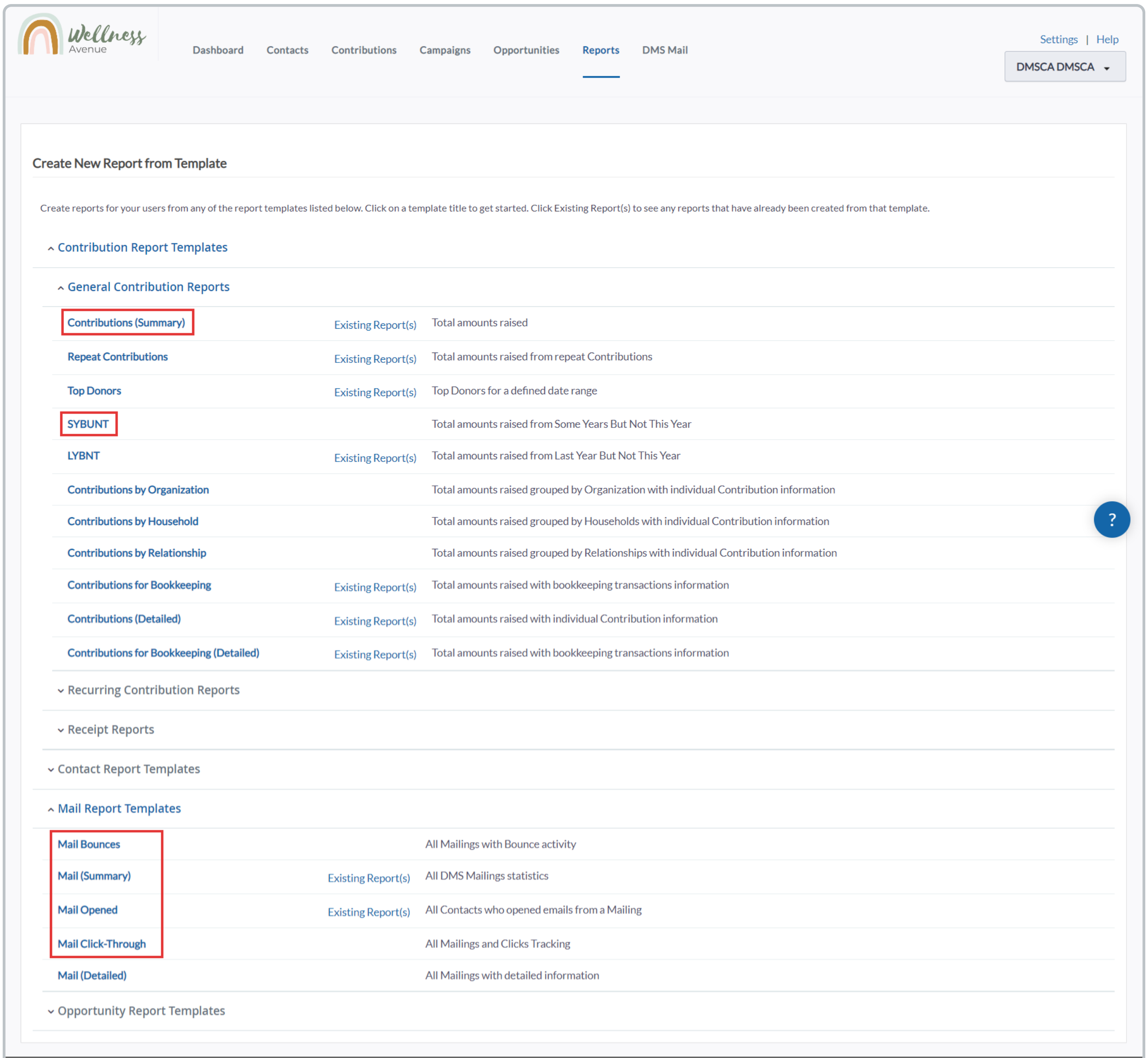

*Reports > New Report*

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



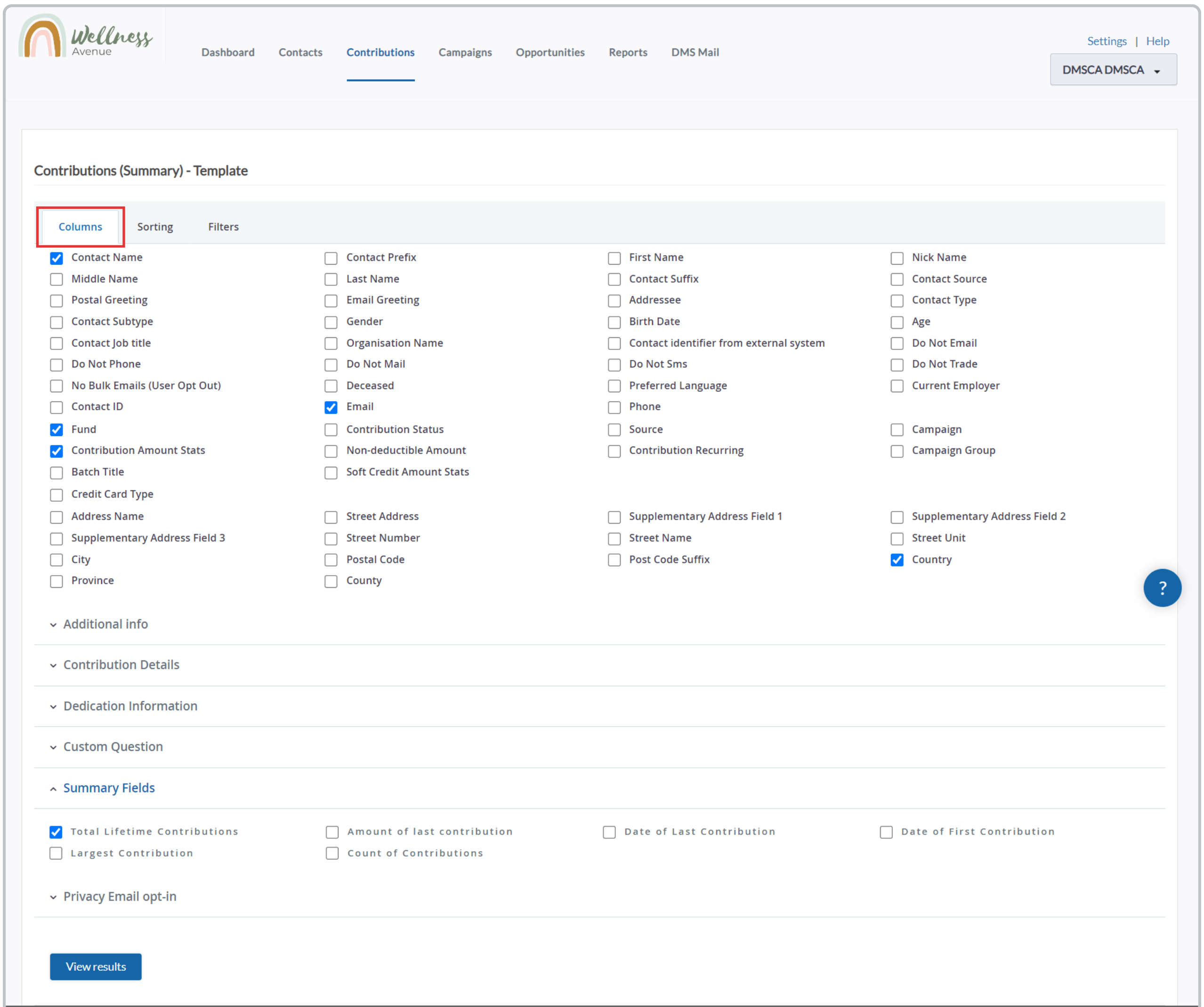

*New Reports from template*

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




*Select from one of the applicable New Reports*

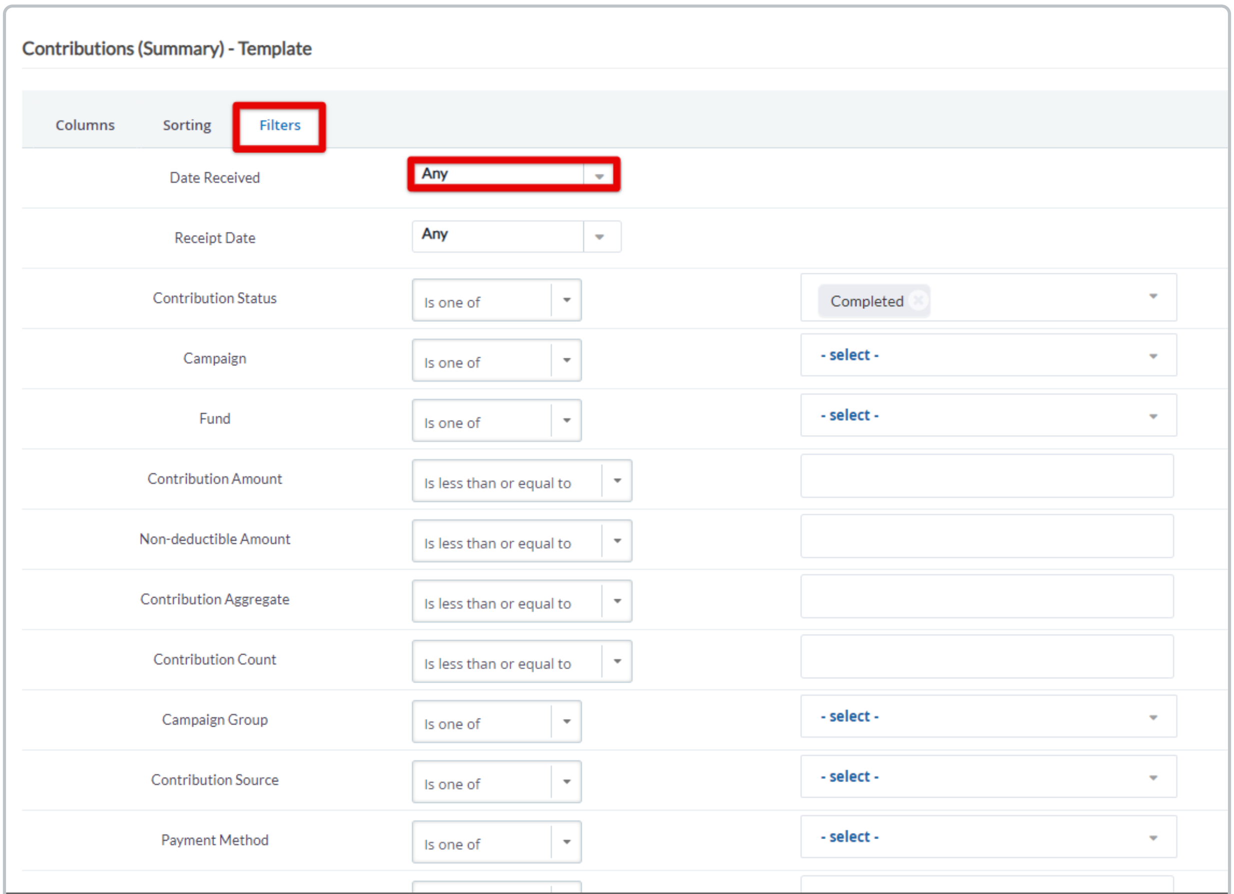
4. Within your selected Report Template, you can modify Columns to change the type of information you will view in your Chart:




*Choose your Report columns*

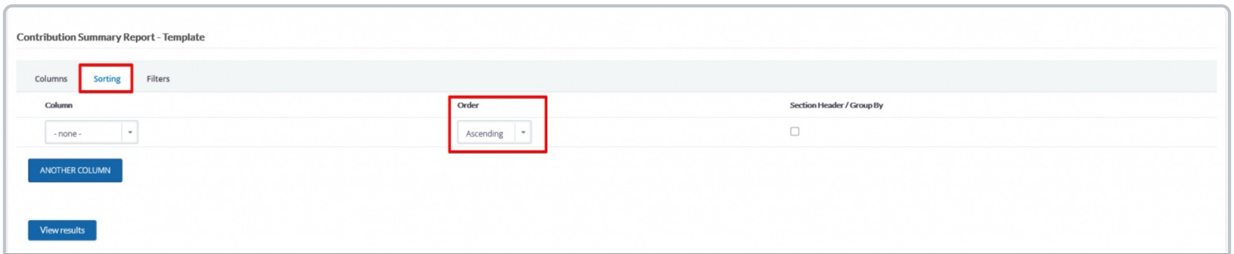
5. In addition, you can modify:

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



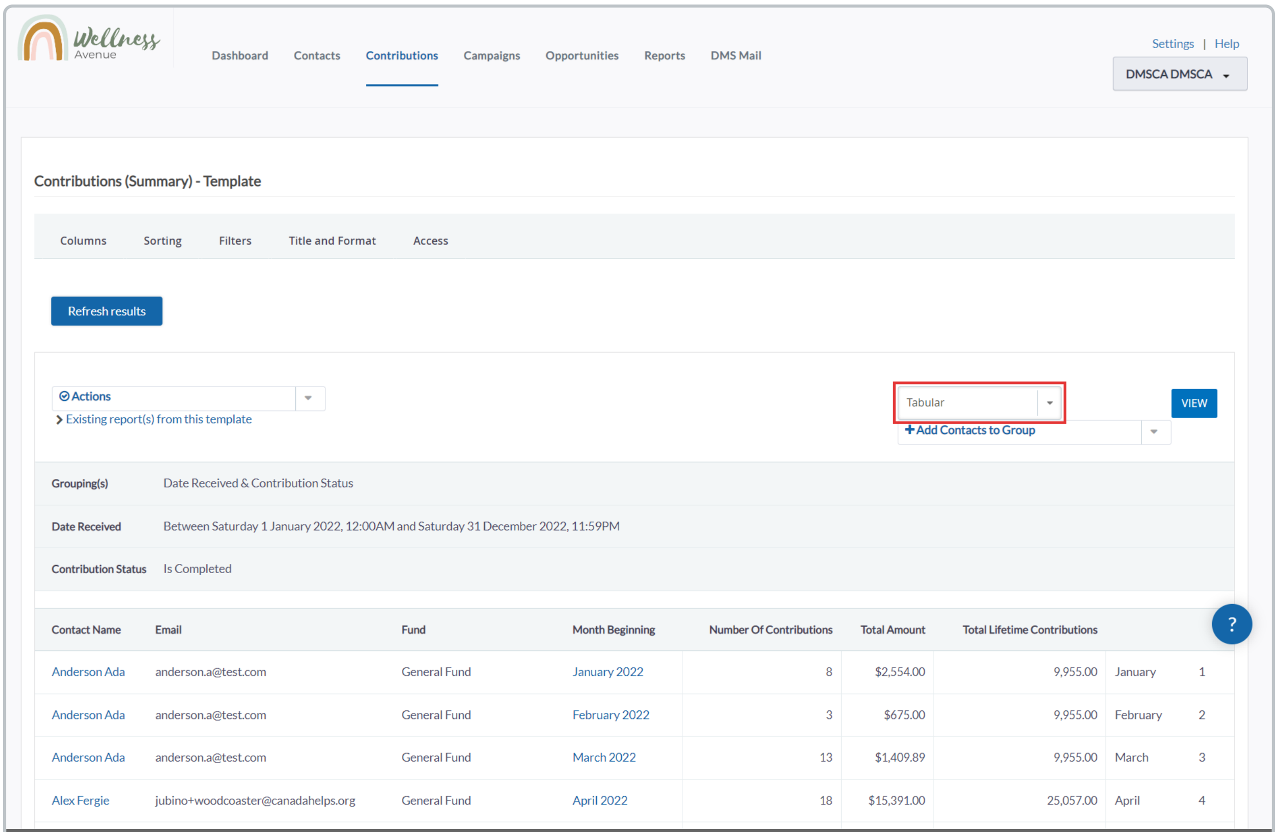

*Reports Date Filter*

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




*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.

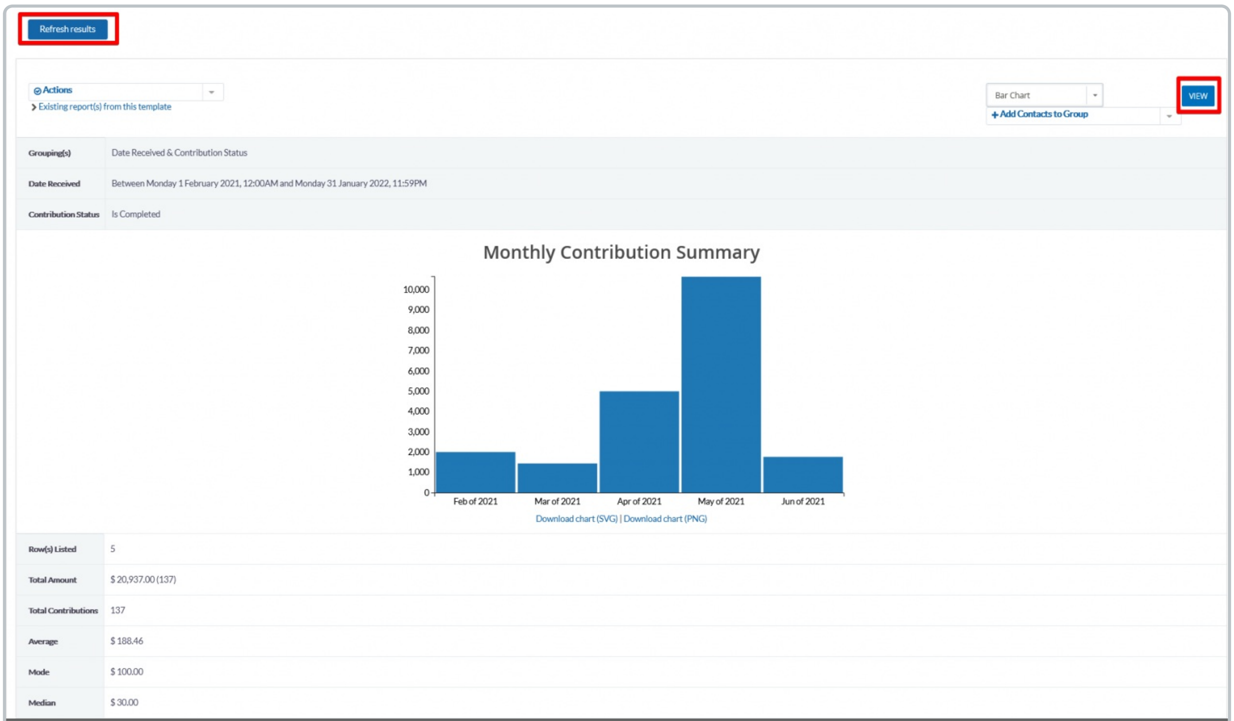



*Report in Tabular mode*

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.**




*Fiscal Year Bar Chart*

**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


*Actions*

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