# Create a Custom Report

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GiveSmart	Search		Arthur Demo V S Stephanie
🗬 Launchpad	Reports		
Dashboard			
Households & Groups <	-	Segmented Financial Summaries > Examine the summary and effectiveness of specific	Trend Analysis         >           Examine your current financial metrics vs. the same time         >
Donors & Contacts		or any other field.	period in the past. Discover growth/loss percentages and other metrics.
Gifts <			
Pledges <			
Collect Donations	Custom Reports  Pinned To Top	Search	+ ADD NEW
Activities	Pinned Report Name \$	Created By 🗢 Date Range 🗘	Last Updated 👻
Reports			
Filters			
Resources			
<u></u>			

## Create a custom report

- 1. From the left navigation, select Reports
- 2. Click +Add New
- 3. Enter a unique report name and select a specific data set

Dataset* required	
Select Dataset	^
Contacts	
Transactions	
Contacts And Transactions	

- 4. Customize the report by selecting a date range and adding/removing columns
  - 1. Add/Remove Columns
    - Add: Locate and click on the column from the left container. Click the right arrow to add to the report
    - **Remove**: Locate and click on the column from the right container. Click the left arrow to remove from the report
  - 2. Adjust Column Order
    - Locate and select the column in the right container. Use the up/down arrows to adjust the order

tart typing to filter columns			
ctivities	A	First Name (required) - Contact	*
Activity Type		Last Name (required) - Contact	
heckbox		Record Created (required) - Contact	
Completion Date			
date	$\rightarrow$		
date kjew		-	
dropdown	<b>←</b>		
Due Date			
Due Time			

5. Once complete, choose: Save, Save as New, or Download Excel

CANCEL	SAVE 🗸
	Save
	Save as New
	Download Exce

## Manage custom reports

= GiveSmart <sup>®</sup> Donor CRM	Search	Opener'22	2 ~	S Stephanle
Launchpad	Reports			
Dashboard				
Households & Groups <	Donor Reports > Segmented Financial Summaries >	Trend Ana		>
Donors & Contacts <	Summary of donor metrics across a specific time period. Summary of donor metrics across a specific time period. Solicitation methods, general ledgers, campaigns, solicitors, or any other field.		rent financial metrics v Discover growth/loss	
Glfts <				
Pledges <				
Collect Donations <	Custom Reports Pinned To Top Search			+ ADD NEW
Activities	Pinned Report Name 🌣	Created By 🜲	Date Range 💲	Last Updated 👻
Reports	- All Data for Contacts and Transactions from last 90 days	Kinga Patok	Last 7 Days	22 Nov, 2023
Filters	- 📩 Today's Other gifts	Kinga Patok	Last 90 Days	22 Nov, 2023
	- 📩 Last 30 days gifts (without custom fields) 1	Kinga Patok	Last 30 Days	21 Nov, 2023
	📩 Contacts Refunded last 90days - stats error	Kinga Patok	Last 90 Days	21 Nov, 2023
	- 🚽 All Contacts and Transactions data from Yesterday Update	Kinga Patok	Yesterday	21 Nov, 2023
	All Gifts fields	Kinga Patok	Last 7 Days	22 Nov, 2023
	- In-Kind Gifts from last week	Kinga Patok	Last 7 Days	22 Nov, 2023
Derouves	- Test Data Range update test 3	Kinga Patok	31 Jan, 2022 20 Nov, 2023	22 Nov, 2023
Q	Custom Report update test2	Kinga Patok	Today	22 Nov, 2023

## Edit saved custom reports

- 1. From the left navigation, select Reports
- 2. Click ... next to the saved custom report, and select Edit
- 3. Edit the report, then choose: Save, Save as New, or Download Excel

**NOTE:** The Last Updated column will update to reflect the latest save/download date.

### Download saved custom reports

- 1. From the left navigation, select **Reports**
- 2. Click ... next to the saved custom report, and select Download Excel
- 3. A notification will appear indicating the download has started. Work can continue while the file is preparing for download
- 4. A notification will appear when the download is ready

NOTE: The Last Updated column will update to reflect the latest save/download date.

## Pin/unpin saved custom report

- 1. From the left navigation, select Reports
- 2. Click ... next to the saved custom report, and select Pin Report or Unpin Report
- 3. A notification will appear indicating the report has been pinned or unpinned

**NOTE**: Pin frequently accessed reports so they always show on the main Reports page. Pinned reports are sorted by the Last Updated column, with the most recent at the top.

## Delete saved custom report

- 1. From the left navigation, select Reports
- 2. Click ... next to the saved custom report, and select delete
- 3. A warning message will appear to confirm the deletion

Warning			X CANCEL
You are about to want to delete th		om report <b>Contacts and Gifts</b> . A ?	re you sure you
	CANCEL	DELETE PERMANENTLY	

4. Click Delete Permanently to confirm the deletion

WARNING: You cannot restore a deleted report, you will need to create and save it again

## Dataset required and optional fields

### Dataset required columns

Contacts Dataset	Transactions Dataset	Contacts & Transactions Dataset
First Name - Contact	First Name - Contact	First Name - Contact
Last Name - Contact	Last Name - Contact	Last Name - Contact
Record Created - Contact	Gift Date - Gift	Gift Date - Gift
		Record Created - Contact

## Dataset optional columns

Contacts Dataset	Transactions Dataset	Contacts & Transactions Dataset
Contact	Not Included	Contact
<ul> <li>Contact Type</li> <li>Birthdate</li> <li>Donor ID</li> <li>External ID</li> <li>Facebook Profile</li> <li>Instagram Profile</li> <li>Linkedin Profile</li> <li>Record Updated</li> <li>Notes</li> <li>Salutation</li> <li>Suffix</li> <li>Tags</li> <li>Title</li> <li>Twitter Profile</li> </ul>	Not Included	<ul> <li>Contact Type</li> <li>Birthdate</li> <li>Donor ID</li> <li>External ID</li> <li>Facebook Profile</li> <li>Instagram Profile</li> <li>Linkedin Profile</li> <li>Record Updated</li> <li>Notes</li> <li>Salutation</li> <li>Suffix</li> <li>Tags</li> <li>Title</li> <li>Twitter Profile</li> </ul>
Addresses	Not Included	Addresses

<ul> <li>Address 1</li> <li>Address 2</li> <li>Address 3</li> <li>Address 4</li> <li>City</li> <li>Postal Code</li> <li>State Province</li> </ul>	Not Included	<ul> <li>Address 1</li> <li>Address 2</li> <li>Address 3</li> <li>Address 4</li> <li>City</li> <li>Postal Code</li> <li>State Province</li> </ul>
Contact Methods	Not Included	Contact Methods
<ul> <li>Cell Phone</li> <li>Email</li> <li>Fax</li> <li>Home Phone</li> <li>Website</li> <li>Work Phone</li> </ul>	Not Included	Cell Phone     Email     Fax     Home Phone     Website     Work Phone
Activities	Not Included	Activities
<ul> <li>Activity Type</li> <li>Completion Date</li> <li>Due Date</li> <li>Due Time</li> <li>Notes</li> <li>User ID</li> </ul>	Not Included	<ul> <li>Activity Type</li> <li>Completion Date</li> <li>Due Date</li> <li>Due Time</li> <li>Notes</li> <li>User ID</li> </ul>
Groups	Not Included	Groups
<ul><li>Group ID</li><li>Group Name</li><li>Group Relationship</li></ul>	Not Included	<ul><li>Group ID</li><li>Group Name</li><li>Group Relationship</li></ul>
Activities Custom Fields	Not Included	Activities Custom Fields
All Activity custom fields listed by their name in alpha order	Not Included	All Activity custom fields listed by their name in alpha order
Contact Custom Fields	Not Included	Contact Custom Fields
All Contact custom fields listed by their name in alpha order	Not Included	All Contact custom fields listed by their name in alpha order
Not Included	Gift Custom Fields	Gift Custom Fields

Not Included	All Gifts/Pledges     custom fields listed by     their name in alpha     order	All Gifts/Pledges     custom fields listed by     their name in alpha     order
Not Included	Gift Details	Gift Details
Not Included	<ul> <li>Asset Amount</li> <li>Asset Description</li> <li>Asset Gift Date</li> <li>Campaign</li> <li>External System</li> <li>External Transaction ID</li> <li>Fair Market Value</li> <li>General Ledger</li> <li>Gift Amount</li> <li>Gift Type</li> <li>Notes</li> <li>Payment Attempts Count</li> <li>Payment Status</li> <li>Quantity</li> <li>Record Created</li> <li>Record Updated</li> <li>Solicitation Method</li> <li>Solicitor</li> <li>Sub Solicitation</li> <li>Tax Deductible Amount</li> <li>Thank You Method</li> <li>Transaction ID</li> <li>Tribute Name</li> <li>Tribute Type</li> </ul>	<ul> <li>Asset Amount</li> <li>Asset Description</li> <li>Asset Gift Date</li> <li>Campaign</li> <li>External System</li> <li>External Transaction ID</li> <li>Fair Market Value</li> <li>General Ledger</li> <li>Gift Amount</li> <li>Gift Type</li> <li>Notes</li> <li>Payment Attempts Count</li> <li>Payment Status</li> <li>Quantity</li> <li>Record Created</li> <li>Record Updated</li> <li>Solicitation Method</li> <li>Solicitor</li> <li>Sub Solicitation</li> <li>Tax Deductible Amount</li> <li>Thank You Method</li> <li>Transaction ID</li> <li>Tribute Name</li> <li>Tribute Type</li> </ul>
Contact Gift Details	Not Included	Contact Gift Details
<ul> <li>Average Gift Amount</li> <li>Donor Search Rating</li> <li>Estimated Gift Capacity</li> <li>Most Recent Gift Date</li> <li>Most Recent Gift Amount</li> </ul>	Not Included	<ul> <li>Average Gift Amount</li> <li>Donor Search Rating</li> <li>Estimated Gift Capacity</li> <li>Most Recent Gift Date</li> <li>Most Recent Gift Amount</li> </ul>