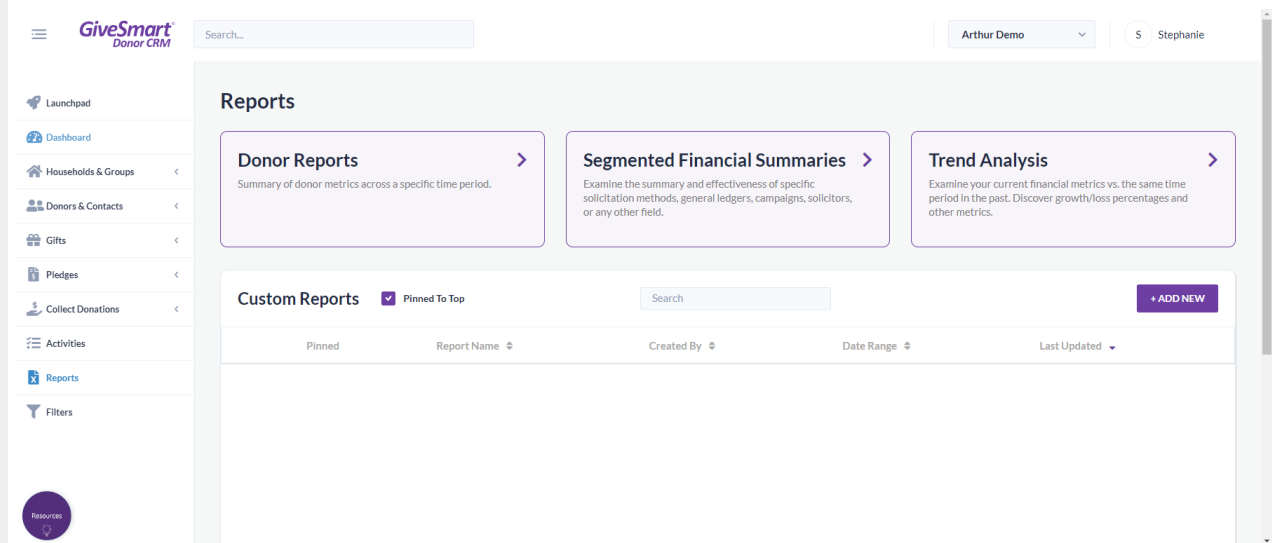


Create a Custom Report

Last Modified on 06/27/2024 1:08 pm EDT



Create a custom report

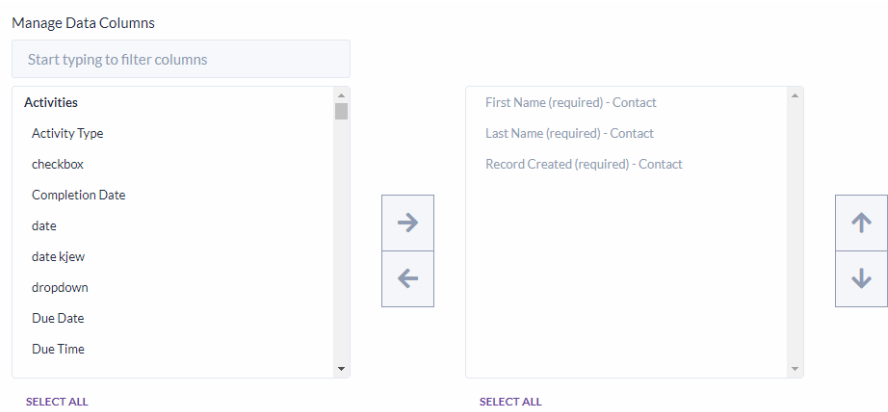
1. From the left navigation, select **Reports**
2. Click **+Add New**
3. Enter a unique report name and select a specific data set

Dataset **required*

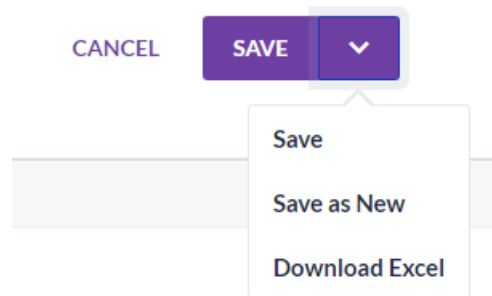
Select Dataset

- 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



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



Manage custom reports

Pinned	Report Name	Created By	Date Range	Last Updated
★	All Data for Contacts and Transactions from last 90 days	Kinga Patok	Last 7 Days	22 Nov, 2023
★	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
	Test Data Range update test 3	Kinga Patok	31 Jan, 2022 20 Nov, 2023	22 Nov, 2023
	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.

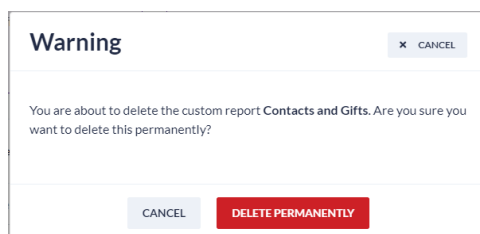
Pin/unpin saved custom report

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



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 style="list-style-type: none"> • Contact Type • Birthdate • Donor ID • External ID • Facebook Profile • Instagram Profile • Linkedin Profile • Record Updated • Notes • Salutation • Suffix • Tags • Title • Twitter Profile 	Not Included	<ul style="list-style-type: none"> • Contact Type • Birthdate • Donor ID • External ID • Facebook Profile • Instagram Profile • Linkedin Profile • Record Updated • Notes • Salutation • Suffix • Tags • Title • Twitter Profile
Addresses	Not Included	Addresses

<ul style="list-style-type: none"> • Address 1 • Address 2 • Address 3 • Address 4 • City • Postal Code • State Province 	Not Included	<ul style="list-style-type: none"> • Address 1 • Address 2 • Address 3 • Address 4 • City • Postal Code • State Province
Contact Methods	Not Included	Contact Methods
<ul style="list-style-type: none"> • Cell Phone • Email • Fax • Home Phone • Website • Work Phone 	Not Included	<ul style="list-style-type: none"> • Cell Phone • Email • Fax • Home Phone • Website • Work Phone
Activities	Not Included	Activities
<ul style="list-style-type: none"> • Activity Type • Completion Date • Due Date • Due Time • Notes • User ID 	Not Included	<ul style="list-style-type: none"> • Activity Type • Completion Date • Due Date • Due Time • Notes • User ID
Groups	Not Included	Groups
<ul style="list-style-type: none"> • Group ID • Group Name • Group Relationship 	Not Included	<ul style="list-style-type: none"> • Group ID • Group Name • Group Relationship
Activities Custom Fields	Not Included	Activities Custom Fields
<ul style="list-style-type: none"> • All Activity custom fields listed by their name in alpha order 	Not Included	<ul style="list-style-type: none"> • All Activity custom fields listed by their name in alpha order
Contact Custom Fields	Not Included	Contact Custom Fields
<ul style="list-style-type: none"> • All Contact custom fields listed by their name in alpha order 	Not Included	<ul style="list-style-type: none"> • All Contact custom fields listed by their name in alpha order
Not Included	Gift Custom Fields	Gift Custom Fields

Not Included	<ul style="list-style-type: none"> • All Gifts/Pledges custom fields listed by their name in alpha order 	<ul style="list-style-type: none"> • All Gifts/Pledges custom fields listed by their name in alpha order
Not Included	Gift Details	Gift Details
Not Included	<ul style="list-style-type: none"> • Asset Amount • Asset Description • Asset Gift Date • Campaign • External System • External Transaction ID • Fair Market Value • General Ledger • Gift Amount • Gift Type • Notes • Payment Attempts Count • Payment Status • Quantity • Record Created • Record Updated • Solicitation Method • Solicitor • Sub Solicitation • Tax Deductible Amount • Thank You Method • Transaction ID • Tribute Name • Tribute Type 	<ul style="list-style-type: none"> • Asset Amount • Asset Description • Asset Gift Date • Campaign • External System • External Transaction ID • Fair Market Value • General Ledger • Gift Amount • Gift Type • Notes • Payment Attempts Count • Payment Status • Quantity • Record Created • Record Updated • Solicitation Method • Solicitor • Sub Solicitation • Tax Deductible Amount • Thank You Method • Transaction ID • Tribute Name • Tribute Type
Contact Gift Details	Not Included	Contact Gift Details
<ul style="list-style-type: none"> • Average Gift Amount • Donor Search Rating • Estimated Gift Capacity • Most Recent Gift Date • Most Recent Gift Amount 	Not Included	<ul style="list-style-type: none"> • Average Gift Amount • Donor Search Rating • Estimated Gift Capacity • Most Recent Gift Date • Most Recent Gift Amount

