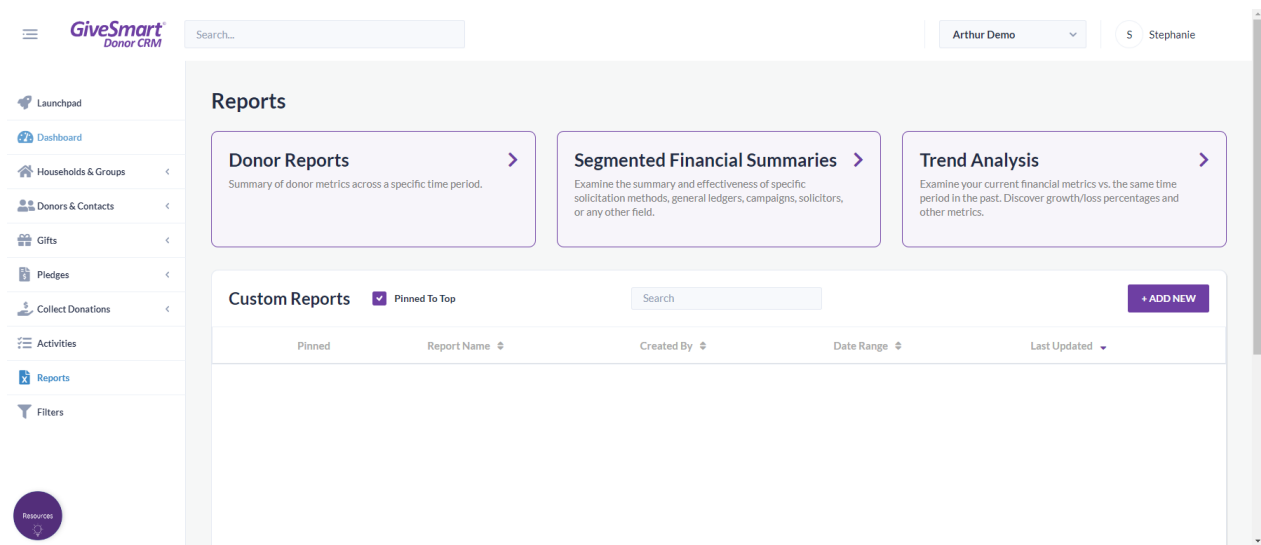


# CRM: Create a Custom Report

Last Modified on 11/27/2023 5:56 am PST



## 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 <sup>\*required</sup>

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

Manage Data Columns

Start typing to filter columns

Activities
Activity Type
checkbox
Completion Date
date
date kjew
dropdown
Due Date
Due Time

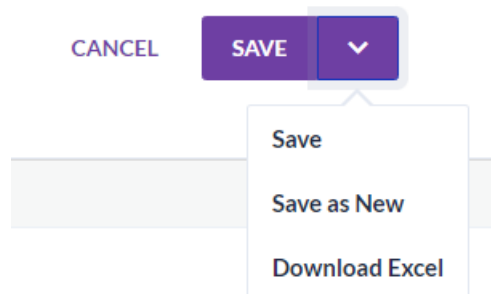
→
←

First Name (required) - Contact
Last Name (required) - Contact
Record Created (required) - Contact

↑
↓

SELECT ALL
SELECT ALL

- Once complete, choose: Save, Save as New, or Download Excel



## Manage custom reports

GiveSmart Donor CRM

Search...

Opener'22

S Stephanie

Launchpad

Dashboard

Households & Groups

Donors & Contacts

Gifts

Pledges

Collect Donations

Activities

Reports

Filters

### Reports

**Donor Reports**
Summary of donor metrics across a specific time period.

**Segmented Financial Summaries**
Examine the summary and effectiveness of specific solicitation methods, general ledgers, campaigns, solicitors, or any other field.

**Trend Analysis**
Examine your current financial metrics vs. the same time period in the past. Discover growth/loss percentages and other metrics.

#### Custom Reports

Pinned To Top

Search

+ ADD NEW

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

- From the left navigation, select **Reports**
- Click ... next to the saved custom report, and select **Edit**
- 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.

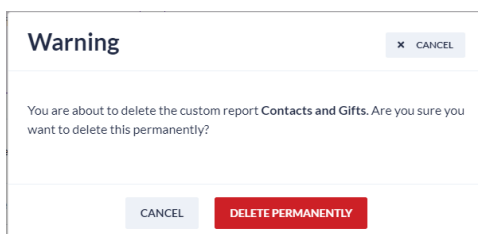
## Pin/unpin saved custom report

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"><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 style="list-style-type: none"><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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <li>• Cell Phone</li> <li>• Email</li> <li>• Fax</li> <li>• Home Phone</li> <li>• Website</li> <li>• Work Phone</li> </ul>	Not Included	<ul style="list-style-type: none"> <li>• Cell Phone</li> <li>• Email</li> <li>• Fax</li> <li>• Home Phone</li> <li>• Website</li> <li>• Work Phone</li> </ul>
Activities	Not Included	Activities
<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <li>• Group ID</li> <li>• Group Name</li> <li>• Group Relationship</li> </ul>	Not Included	<ul style="list-style-type: none"> <li>• Group ID</li> <li>• Group Name</li> <li>• Group Relationship</li> </ul>
Activities Custom Fields	Not Included	Activities Custom Fields
<ul style="list-style-type: none"> <li>• All Activity custom fields listed by their name in alpha order</li> </ul>	Not Included	<ul style="list-style-type: none"> <li>• All Activity custom fields listed by their name in alpha order</li> </ul>
Contact Custom Fields	Not Included	Contact Custom Fields
<ul style="list-style-type: none"> <li>• All Contact custom fields listed by their name in alpha order</li> </ul>	Not Included	<ul style="list-style-type: none"> <li>• All Contact custom fields listed by their name in alpha order</li> </ul>
Not Included	Gift Custom Fields	Gift Custom Fields

Not Included	<ul style="list-style-type: none"> <li>• All Gifts/Pledges custom fields listed by their name in alpha order</li> </ul>	<ul style="list-style-type: none"> <li>• All Gifts/Pledges custom fields listed by their name in alpha order</li> </ul>
Not Included	Gift Details	Gift Details
Not Included	<ul style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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 style="list-style-type: none"> <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>

