

# HOW TO CREATE A CUSTOM REPORT WITH THE EASY REPORT BUILDER

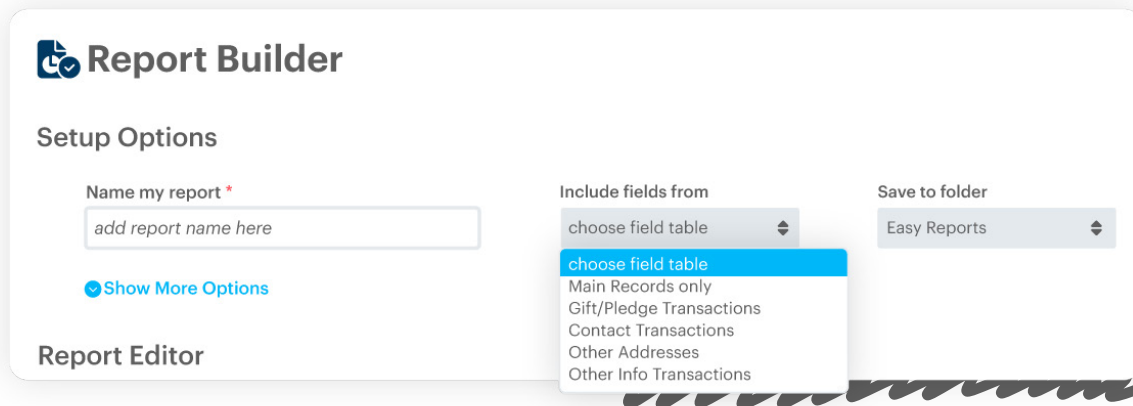
The Easy Report Builder makes it simple to create customized reports. Find all your custom reports in the **Easy Reports** folder in the Report Center.

From the navigation bar choose **Reports > Easy Report Builder**.

## Step 1: Name your report.

## Step 2: Select the Type of Data

1. From the Include fields drop-down choose your field table.



**Report Builder**

**Setup Options**

Name my report \*  
add report name here

Show More Options

**Report Editor**

Include fields from  
choose field table

- choose field table
- Main Records only
- Gift/Pledge Transactions
- Contact Transactions
- Other Addresses
- Other Info Transactions

Save to folder  
Easy Reports

2. Select what type of records you will be using in the report:

- If you are planning to create a report that includes fields from the Main/Bio Screen, you need to click **Main Records only**.
- To include fields from the Gift or Pledge screens and fields from Main/Bio, click **Gift/Pledge Transactions**.

- If you want a report with transactions from the Contact screen, and fields from Main/Bio, click **Contact Transactions**.
- To include fields from the Addresses screen and fields from Main/Bio, click **Other Addresses**.
- For Other Information and fields from Main/Bio, click **Other Info Transactions**.

### 3. Heads up!

- You must include in your easy report at least one field from the DonorPerfect table that corresponds to the base records you choose.
- You can only save easy reports to the Easy Reports folder.

## Step 3: Setting Additional Options

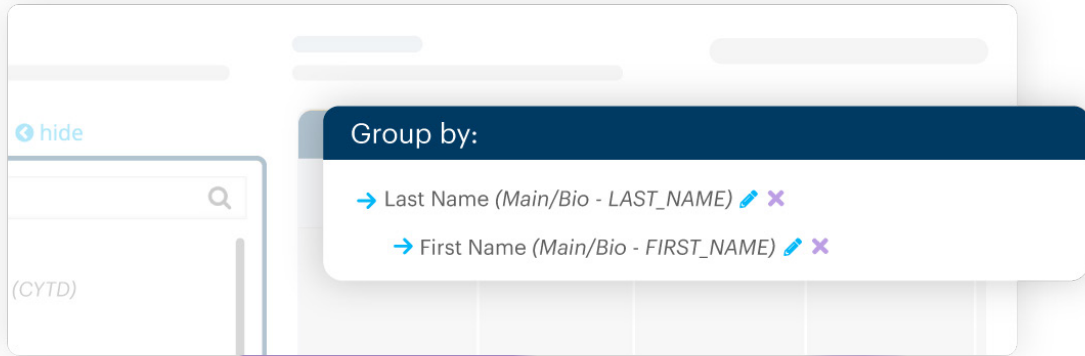
1. Click on Show More Options
2. You can add a brief description of your report (optional, but encouraged)
3. Based on your report, you can change its orientation between portrait and landscape

## Step 4: Choose Which Fields to Group By

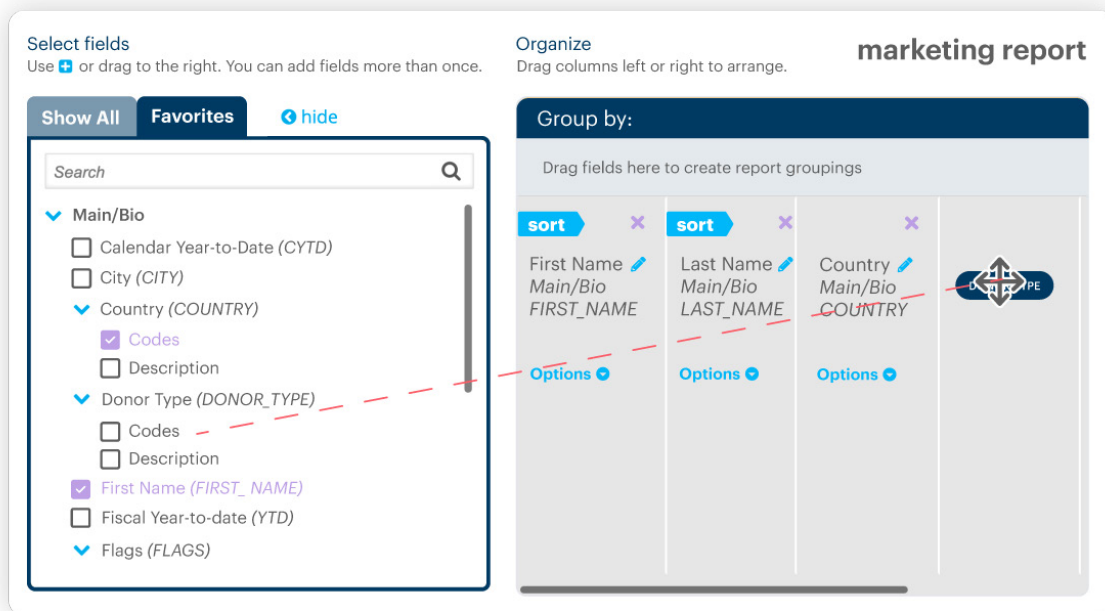
In an easy report, you can choose to group your data by something that the data has in common. Grouping is optional.

To group your report by one or more fields, like Last Name then First Name, drag and drop to the **Group by** section.



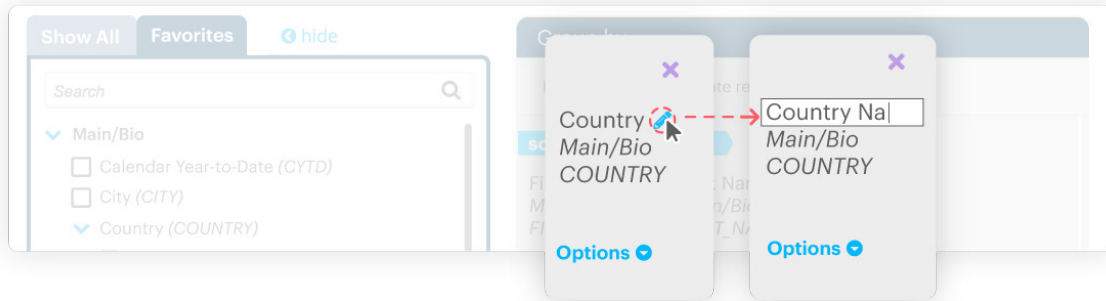


## Step 5: Choose Which Fields to Display in the Report



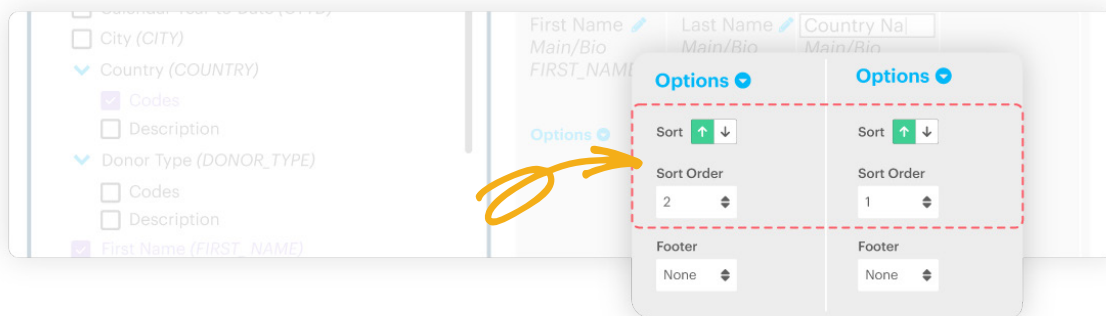
- To **find fields**, either choose between the Show All and Favorites tab or use the search box
- To **add fields**, simply drag and drop or select the check box next to the selected fields

- To **remove** selected fields, click the **red x icon** ✕
- To **rename** a selected field, click the **pencil icon** ✎



## Step 6: Choose Which Fields to Sort By

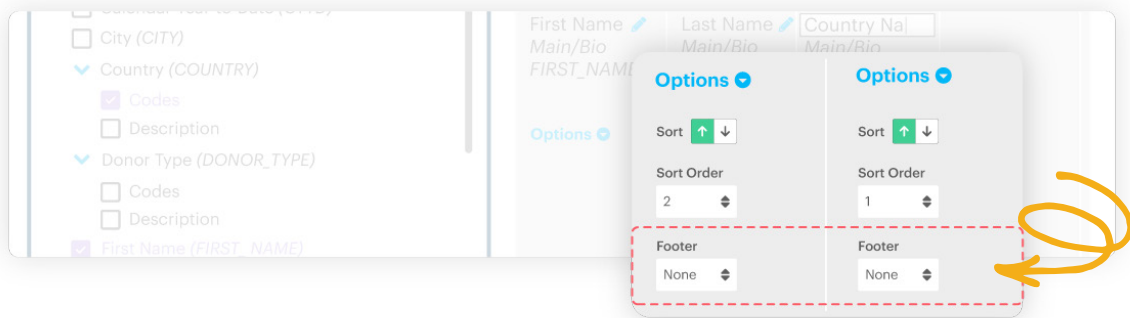
- To **sort**, click the Options drop-down and click the up arrow (ascending order) or the down arrow (descending order)
- Select the **Sort Order**. The Sort Order is the order you want to display the data on the report. To have your report display in alphabetical order of the donor name, choose 1 as the sort order for Last Name and 2 for First Name.



- To **remove sorting** from a field, re-click the selected sorting option.

## Step 7: Change Report Layout

- To **change the order of your selected fields**, simply drag and drop to your desired location
- To **add a footer** to any field, click options and click the footer drop-down. Fields like Name and Email will only have a count option. However, fields like Gift Total will give you the option to choose footers like Sum, Average and Count.



Once you have all your fields selected and in the order you want, simply click **Save** or **Save and Run** to view immediately.