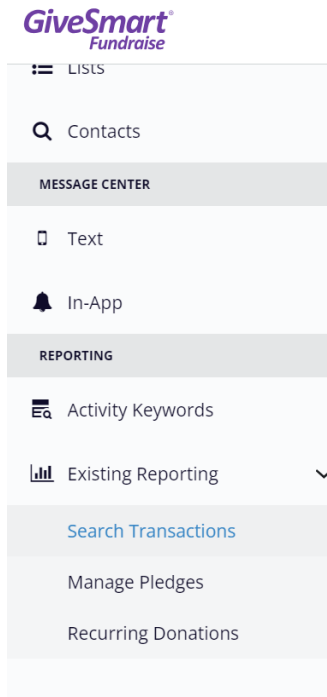


# Saved Reports

Last Modified on 09/26/2023 12:37 pm PDT

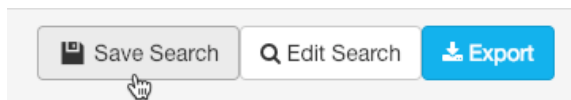
You can save your various reports and access them from one location under the **Saved Reports** tab under **Existing Reporting > Search Transactions**. All filters, such as Date Information, Campaign, or Keyword, and any export fields you select will be saved, so you can run that report with far fewer clicks.



## Creating Your Report

To create your Saved Report you must first build your report as normal, [as outlined here](#). When you would normally get ready to Export your report, you have the option to save this Report you've filtered.

- Click **Save Search**.



- **Name** the Report
- Set the **Visibility**. You have the choice of All or Only Me. In general, we recommend selecting **All**, so others on your team can benefit from your Settings/Report.

## Save New Report ×

Save your report filters, including export settings, to allow fast and easy access to the information you care about the most.

Report Name \*

Visibility

Who can see and access this report.

Date Range: **This Year**

Cancel

Save Report

- The columns should have already been set when you first ran the report from Search Transaction and the **Manage Columns** button.
- Click **Save Report**.

If everything worked correctly, you should be alerted that your report (by name) is now saved and you can click the link to go see your various Saved Reports.

Saved Current Annual Report successfully. Click [here](#) to manage your reports. ×

## Using Your Saved Reports

To start using your Saved Reports, you will start with the same process by going to **Existing Reporting > Search Transactions**.

- LISTS
- Contacts
- MESSAGE CENTER
- Text
- In-App
- REPORTING
- Activity Keywords
- Existing Reporting
- Search Transactions
- Manage Pledges
- Recurring Donations

- Click on the **Saved Reports tab** in the upper left.

← Back to Dashboard

## Search Transactions

Report Builder **Saved Reports**

- Find the report you wish to work with.

## Search Transactions

Report Builder **Saved Reports**

Name	Date Range	Created By	Visible To	Actions
Monthly Report	Last Month	Former User	All	...
Current Annual Report	This Year	Former User	All	...
Donor CRM Export	09/01/2022 - 09/30/2022 (30 days)	Debbie Director	All	...

- Click the **Actions Menu** to the right, for your choices:

**Actions**

- Run
- Edit
- Download
- Delete

- Run:** Running your report is the same as if you are filtering a new report. You will

end on the Results screen where you can review the snapshot of information, make changes to the columns, and export the report via the Export button in the upper right. You can also click **Back to Saved Reports**.

◀ **Back to Saved Reports**

## Current Annual Report

**Search Criteria** (click to toggle)

01/01/2021 - 12/31/2021 (365 Days)

- **Edit:** Editing your Saved Report allows you to adjust the Name of the report and the Visibility of your report.

### Edit Report ✕

Report Name \*

Current Annual Report

Visibility

All ▼

Who can see and access this report.

Date Range: **This Year**

Cancel

Save Changes

- **Download:** Downloading your report is the one-click method to download that report with all your saved settings. There are no additional screens, it will just start processing the report's request and start the download. If everything is set correctly with your report, this will likely be the most used option for you.
- **Delete:** If you do not want a specific report anymore, you can delete it. It will give you a warning to confirm that you want to delete it, then it will alert you that the specific report has been deleted.

fundraise.givesmart.com says

Are you sure?

OK

Cancel

Deleted Annual Stats successfully. ✕

