

How to organize reports for easy access

Admin reports allows administrators to generate, view, customize, and export complex reports to track any element of their campaign. There are approximately 15 reports, all revolving around donation and member information. Admin reports sports a tabbed interface, allowing multiple reports to be open at the same time. The first and default tab is "Reports Home", which features a list of all the available reports. To the left of this list, the same reports appear categorized in folders. To open a report, you can select it either from the reports list or the folders.

Favorites

To more easily access your frequently used reports, open the report, and click "Add to Favorites" in the top bar.



Your favorite reports will appear in the top folder "My Favorites" to the left of the main reports window.

Tags

With admin reports, you can use tags to organize your reports your way. You can add new tags or apply existing ones in the tags field in the top bar.



Your tags will appear in reports list, under the tags column. You can filter the reports list to display only those with a specific tag using the "Filter by Tag" dropdown above the reports list.

