

Create and save a custom report view

Rallybound Reports includes a feature that allows administrators to create and save custom reports. To do this, follow these steps:

1. Log in to the Admin at admin.rallybound.com
2. Navigate to the campaign on which to run this report
3. Click the "Reports" tab
4. Choose a report to run, double-click, and click "Run Report".
5. Use the column header dropdowns to:
 - a. Show/hide the desired columns
 - b. Filter by the desired columns
 - c. Group by the desired columns
 - d. Sort by the desired columns
 - e. And more
6. When you're done, click "Save as.." in the top bar
7. Add a report name and a brief description. This will be used for admins to distinguish which custom report it is.
8. Choose how to save the report: it can be saved as a private report (only the creator of the report has access to it) or as a public report (all administrators in the organization will have access to it).
9. Once the report is saved, it will be available either from the report list or the "Custom Reports" folder on the left.
10. The next time the report is run it will show current data with all the sorts, filters, grouping or column removal intact. You can also delete the report from here, or create a new custom report based on the previously saved one.

The screenshot illustrates the process of creating a custom report in Rallybound Reports. It is divided into three main sections:

- Top Section: Parameters for Donations Report**
This section shows the configuration for a report. It includes fields for "Start Date (inclusive)", "End Date (inclusive)", and "Limit Verified". Below these is a table of donation data with columns: DonationID, Donation Date, Amount, Amount Included, Is Verified, Is Pledge, Recurring Don, and Is Corp-Sponsor. A dropdown menu is open over the "Amount Included" column, showing options for sorting (Ascending/Descending), columns, and filters.
- Middle Section: Save as... Dialog**
A dialog box is open with the title "Save as...". It contains a text input field with "Custom Donations" entered. Below the input is a description: "Donations report with donor name sorted in ascending order". At the bottom, there are two buttons: "Save as public report" and "Save as private report", along with a "Cancel" button.
- Bottom Section: Custom Donations Report View**
This section shows the final custom report view. The title bar reads "Reports Home" and "Custom Donations". The top navigation bar includes buttons for "Run Report", "Run CSV Download", "Save as...", "Delete Custom Report" (highlighted in yellow), and "Show Grid Only". Below this is the "Parameters for Custom Donations Report" section, which has the same date and limit verification fields as the top section. The main content area is titled "Custom Donations" and shows a list of reports, including "My Favorites", "CUSTOM", "Donations", "General", "Members", "Salesforce", "Teams", "Custom Reports", "Custom Donations", and "June Donations".