FAQ: How to Convert an Express Report to a Standard Report

- 1. This tutorial will explain how to convert an Express Report to a Standard Report.
- 2. There are several reporting features that are not available in Express reports, such as the ability to adjust table joins, the ability to add grouping, the ability to add charts, and the ability to add images.
- 3. If your report edit screen looks like the one below, you are in a Basic Report.

Elle Edit View History Bookmarks Iools Help		-	Ø	×
Fundly CRM × +				
C C Q Search	☆自	+ 1		≡
		E Support -		∎ ^
			(\times
1 An Express Report (TB)			0	Î
Name Categories Sorts Filters Layout Options			1	
Select fields to include on report Data Field	Summary	Function		
Donation Contact Name	fx None fx None	~ ^	×××	
Acknowledgment Template Name Acknowledgment Template Name AnonymuGstitt	fx None fx None	~ ^		
Appealtame Batchövenflier Batchövenflier Campagin Created On Donation Amount Donation Amount Event Fund Gift Memo Gift Source I Contact				l
+ Add Blank ØPage Header □Page Footer □Grand Total				E
* つ 団 OpenSam v 0 0 B / U A A 団 甲中山 戸市田田 Theme: Custom v				
An Express Report (CB) Center Name Conter Name Conter Name Conter Name Conter Name Danation Ansourd 3 Danation Dari Conter Name Cip 1 Danation Annowal 3 Danation Dari Conter Name 2 Cip 2 Danation Annowal 4 Donation Dari Conter Name 2 Cip 2 Danation Annowal 4 Donation Dari				1
	i (r. (1))		55 PM 5/2017	2

- 4. You can convert a Basic Report to a Standard Report. THIS CANNOT BE UNDONE.
- 5. You CANNOT convert a Standard Report to a Basic Report.
- 6. To get started, while editing the report, click on the Options tab.

Eile Edit View History Bookmarks Tools Help				- 6	×
Image: Fundly CRM + Image: CRM	,	C Q Search	☆ 自 🔸	î î	, ≡
	Q 🕀 💄 🛲	3	i III NPE Supp	port =	≡ Î
0	Attendees By Year 👔			Execute	\otimes
An Express Report					0
Name Categories	Sorts Filters Layout Options			🖺 📫 🤅)
General Information Export Include Setup Info	No ~				
Advanced Filter Execution Wi					- 14
No Data Qualify Di	splay Mode Show Message V				
					- 11
					- 11
					- 11
					. 8
					- 11
# 🗆 ѐ 🛱 🏈 🕺	🐖 🖩 🥼 S	^	s 🔚 👯 🌈 🕼 🚃	5:39 PM 1/5/2017	

7. Select "Advanced" from the menu on the left.

undly CRM	icokmarks Icols Help X +			- 0	
🕈 🖴 https://crm.f	undly.com/Reports/Enhanced#/	c	🕴 🔍 Search	☆ 自 🕹 🏦 🛡	2
		Q 🕀 💄 🔩 🤊	í	💷 NPE Support *	=
	Crosstab Event Attendees By Year			Beecute	\otimes
	An Express Report			0	2
	Name Categories Sorts Filters Layout	Options		E 🗋 🖸	
C	General Convert Options Convert Express Report to a standard report (this cannot be undone)]+ Advanced				

8. Click on the "Convert Express Report to a standard report..." option. WARNING: THIS WILL IMMEDIATELY CONVERT THE REPORT. There will be no warning, no confirmation to proceed, and no option to cancel. Once you click the button, the report will be converted.

Eile Edit ⊻iew Histo	ny <u>B</u> ookmarks <u>I</u> ools <u>H</u> elp ★ +			- Ø ×
🗲 🕃 🖴 https://d	crm.fundly.com/Reports/Enhanced#/		C Search	☆ 自 🖡 🎓 💟 ☰
Currency	50	Q 🕀 💄 🚮 🤊		(i) 💷 NPE Support * 📃
0	📗 🔄 Crosstab Event Attendees By Year 🔘			
.11	An Express Report			0
		Layout Options		Ľ ⊙
	General Convert Options			
	Export Convert Express Report to a standard report (this cannot Advanced	be undone) -+		
				~ ~ ~
= 🗆 🤤	i 🛱 🦪 🙆 🕺 💷 🖩 🧔 😒			へ 🖮 👯 🌈 🕼 📰 🕺 5:41 PM 🌄

9. The report will be converted to a standard report. The edit report interface will now look like this/the Standard report interface:

