Basic reporting overview

Last Modified on 08/15/2026 10:19 pm EDT

Reports help you understand what is happening across HelpOne and share results with your board, funders, and team.

Common report types

- Donation and campaign summaries
- Volunteer hours and participation
- Contact lists and exports
- Expense reports
- Event registration and attendance (including participant lists)
- Giving history by donor

How to run a report

1. Go to the **Reports** or **Insights** section in the main navigation.
2. Choose the report you need.
3. Set filters (date range, campaign, event, etc.).
4. Run the report.
5. Export to Excel or PDF if you need to share or further analyze the data.

If you need a report that does not appear to exist, ask your administrator -- some reports can be customized or added.