



# Year-End Reporting with Reporting Studio

## **Custom visualization how-to guide**

This guide walks you through a series of custom visualization how-tos you can use in Reporting Studio to track the success of your Giving Season campaign.

Each how-to helps you quickly surface key insights – from participation rates and donation volume to top nonprofits and volunteer hours – so you can see and share your impact with ease

## How to use this guide

Each how-to in this guide outlines a simple, repeatable process you can follow to build a custom report or visualization in Reporting Studio.

Before you begin, we recommend completing these on-demand courses:

- [Introducing Reporting Studio](#)
- [Custom Reporting with Benevity Reporting Studio](#)

### What's inside each how-to

Each how-to follows a 5-step structure:

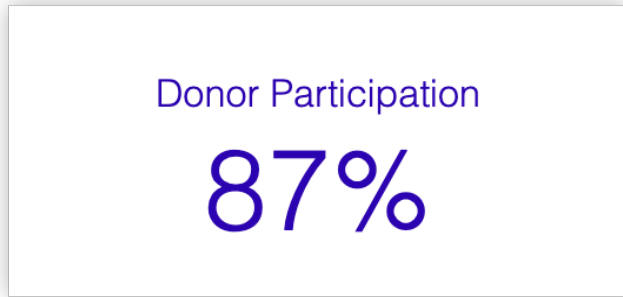
- 1. Explore**  
Choose the dataset (or "Explore") that contains the metrics you want to visualize.
- 2. Data**  
Add or adjust the fields used in your chart or report.
- 3. Filters**  
Refine your data with filters like date range or transaction type.
- 4. Visualization**  
Select your chart style (bar, gauge, map, etc.).
- 5. Run**  
Select Run to generate your visualization.

### Helpful resources *(B-Hive login required)*

- [Discovering Quick Starts](#)
- [Using Explores](#)
- [Creating a data visualization](#)
- [Customizing visualization colors](#)

# Participation Rate Number

Clearly display your program's reach with a single, bold metric showing the percentage of eligible employees who made a donation during the selected period.



## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"><li>• Select <b>Participation Explore</b></li></ul>
<b>2. Data</b>	<ul style="list-style-type: none"><li>• From Participation:<ul style="list-style-type: none"><li>◦ Add the <b>Donor Participation, Volunteer Participation or Overall Participation</b> measure.</li></ul></li></ul>
<b>3. Filters</b>	<ul style="list-style-type: none"><li>• Adjust the <b>Date Range Filter</b> to <b>is in the year</b>.<ul style="list-style-type: none"><li>◦ Choose your desired year</li></ul></li><li>• Adjust the <b>Time Period Filter</b> to <b>is</b> and <b>Year</b></li></ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"><li>• Select the <b>Multiple Value</b> visualization type</li></ul>
<b>5. Run</b>	<ul style="list-style-type: none"><li>• Select <b>Run</b> in the top-right corner.</li></ul>

Donation Participation Rate

1 row - from cache - 1m ago  
See performance details

Run

Participation 1

Find a Field Search Options

Start typing to search

All Fields In Use

Custom Fields + Add

Date Filters 2

Participation 1

Users 4

Filters

Date Filters Date Range Filter Required is in the year 2024 +

AND

Date Filters Time Period Filter Required is Year

+ Filter

+ New group + Custom expression

Visualization Multiple Value

Forecast Edit

Donor Participation  
87%

Data Results Add calculation

Row Limit 500 Totals

2 Participation Donor Participation

1 86.85%

## Displaying total donation volume

Use this view to display the total monetary value of donations processed during a selected time period. This simple, single-value visualization gives you a bold number representing the financial impact of your program.



### Creating the visualization

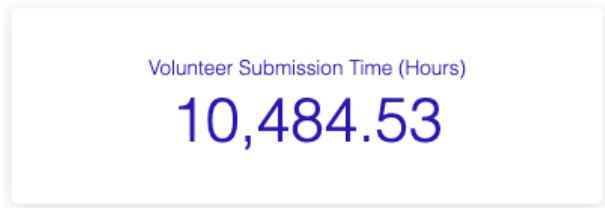
<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Donations Explore</b></li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>Converted Currency Amounts</b>:             <ul style="list-style-type: none"> <li>Add <b>Total Donation Amount</b></li> </ul> </li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>Common Fields</b>:             <ul style="list-style-type: none"> <li>Add <b>Transaction Type</b> → select <b>Donation</b></li> <li>Add <b>Transaction Date</b> → choose your desired date range</li> <li>Add <b>Currency Display</b> → select your preferred currency</li> </ul> </li> <li>From <b>Transactions</b>:             <ul style="list-style-type: none"> <li>Add <b>Transaction Description</b> → select relevant donation types</li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Use the default <b>single value</b> visualization</li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>

The screenshot shows the 'Total Donation Amounts' view in a software interface. The interface is divided into several sections:

- Left Sidebar (1):** A list of fields categorized into 'All Fields' and 'In Use'. The 'In Use' section includes: Custom Fields, \*Common Fields (3), Cause Projects, Causes, Company, Converted Currency Amounts (1), Donation Reports, Donor Details, Foundations, Friendraisers, Giving Opportunities, Payments, Peer Match Details, Transactions (1), and Upcoming Donations.
- Filter Configuration (3):** A central area where filters are applied. The filters shown are:
  - \*Common Fields Transaction Type: is Donation
  - Transactions Transaction Description: is Client Direct Donation, External User Donation, User Donation, User Rewards Donation
  - \*Common Fields Transaction Date: is in range 2024/12/02 until (before) 2024/12/20
  - \*Common Fields Currency Display: is USD
- Visualization (4):** A toolbar at the bottom of the filter area with options for visualization types: Table, Bar, Line, Pie, Gauge, and Single Value. The 'Single Value' option is selected.
- Run Button (5):** A 'Run' button in the top right corner of the interface.
- Data Table (2):** A table at the bottom showing the results of the query. The table has one row with the value 95,443.08. The table header is 'Converted Currency Amounts Total Donation Amount'.

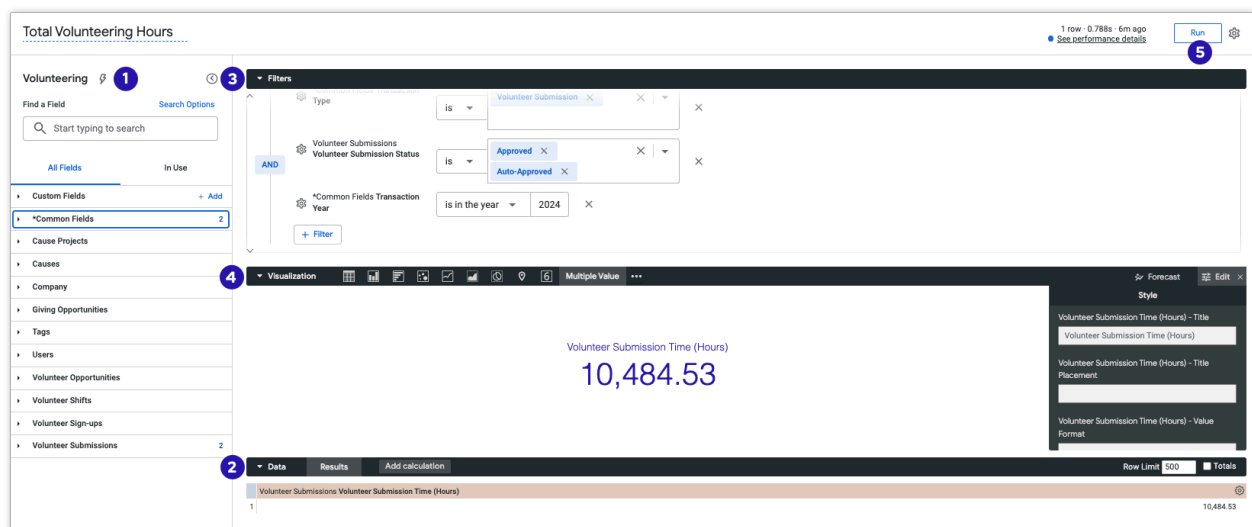
# Displaying total volunteer submission time

Display the total approved volunteer hours logged during the selected timeframe. This simple, single-value visualization gives you a bold number representing the time your employees have contributed.



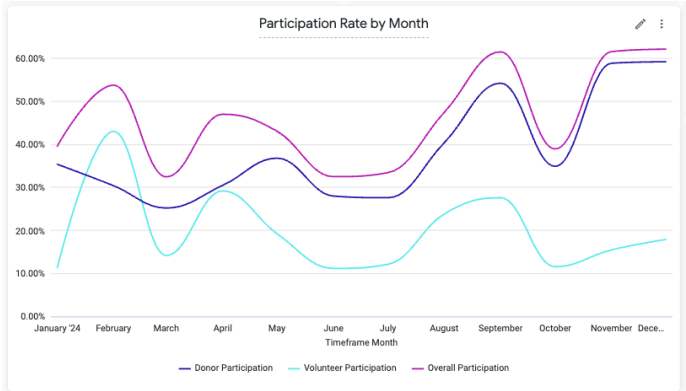
## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Volunteering Explore</b></li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>Volunteer Submissions:</b> <ul style="list-style-type: none"> <li>Add <b>Volunteer Submission Time (Hours)</b></li> </ul> </li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>Common Fields:</b> <ul style="list-style-type: none"> <li>Add <b>Transaction Type</b> → select <b>Volunteer Submission</b></li> <li>Add <b>Transaction Date</b> → select <b>Year</b></li> </ul> </li> <li>From <b>Volunteer Submissions:</b> <ul style="list-style-type: none"> <li>Add <b>Volunteer Submission Status</b> → select <b>Approved</b> and <b>Auto-Approved</b></li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Use the default <b>multiple value</b> visualization</li> <li>Under the <b>Edit</b> menu, add a title</li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>



# Participation rate by month

Use this line chart to track engagement trends over time. This visualization allows you to compare donor, volunteer, and overall participation rates month-over-month to identify peak periods of activity.



## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Participation Explore</b></li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>Participation</b>:             <ul style="list-style-type: none"> <li>Add <b>Donor Participation, Volunteer Participation, Overall Participation</b></li> </ul> </li> <li>From <b>Timeframe Date</b>:             <ul style="list-style-type: none"> <li>Add <b>Month</b></li> </ul> </li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>Date Filters</b> :             <ul style="list-style-type: none"> <li>Add <b>Date Range</b> <ul style="list-style-type: none"> <li>Select <b>Is in the year _____</b></li> </ul> </li> <li>Add <b>Time Period</b> <ul style="list-style-type: none"> <li>Select <b>Is Month</b></li> </ul> </li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Select <b>Line</b> visualization</li> <li>From the <b>edit</b> menu, select chart styling</li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>

Date Filters Timeframe Month	Participation Donor Participation	Participation Volunteer Participation	Participation Overall Participation
1 2024-01	35.38%	11.26%	29.59%
2 2024-02	30.40%	43.05%	53.79%
3 2024-03	25.20%	14.15%	32.45%
4 2024-04	30.46%	29.20%	47.01%
5 2024-05	36.81%	19.21%	43.06%
6 2024-06	27.99%	11.17%	32.51%
7 2024-07	27.61%	12.12%	33.45%
8 2024-08	40.40%	23.84%	47.46%
9 2024-09	54.24%	27.61%	61.52%
10 2024-10	34.90%	11.56%	38.93%

# Top Volunteer Opportunities by hours

Use this table visualization to identify which specific volunteer events drove the most engagement. By ranking opportunities by total hours submitted, you can see exactly which initiatives resonated most with your employees.

	Volunteer Opportunity Name	Volunteer Submission Time (Hours)
1	Get Moving for Good 2024 – Summer Olympics Edition	1,291.43
2	Volunteer with Banc dels Aliments Barcelona	141.50
3	Calgary Pride Parade 2024!	134.50
4	Volunteer for Rock the Causebah 2024	117.00
5	Acme Birthday Bashers!	115.50
6	Hoco 2024: Monday Homecoming Help!	82.00
7	Dumpling Workshop: Celebrating Lunar New Year and making dumplin...	78.00
8	Big Acme Community Day Volunteering	74.67
9	Community Day: Global Community Cleanups!	72.00
10	Remote mapping with Humanitarian OpenStreetMap Team	71.22

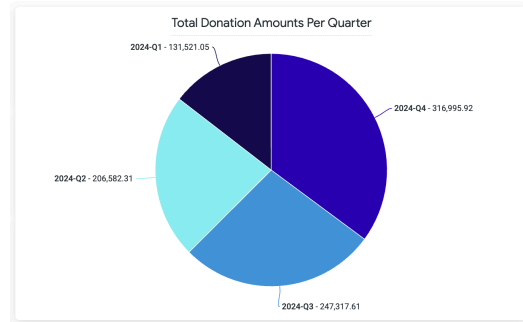
## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Top 10 Cause Categories by Volunteer Hours</b> Quickstart</li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>Causes</b>:               <ul style="list-style-type: none"> <li>Remove <b>Cause Category</b></li> </ul> </li> <li>From <b>Volunteer Opportunity</b> <ul style="list-style-type: none"> <li>Add <b>Volunteer Opportunity Name</b></li> </ul> </li> <li>Set <b>Row Limit</b> to 10 (or desired amount)</li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>Volunteer Opportunity</b> <ul style="list-style-type: none"> <li>Add <b>Volunteer Opportunity Name</b> <ul style="list-style-type: none"> <li>Select <b>is not External Tracked Time</b></li> </ul> </li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Use the <b>Table</b> visualization</li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>

The screenshot shows a data visualization tool interface. At the top, it displays the title 'Top 5 Opportunities (Volunteering) by Hours' and a 'Run' button. Below the title, there are numbered steps 1 through 5 corresponding to the 'Creating the visualization' section. Step 1 shows the 'Volunteering' data source selected. Step 2 shows the 'Data' tab with the visualization type set to 'Table'. Step 3 shows the 'Filters' section with the following filters applied: '\*Common Fields Transaction Type' is 'Volunteer Submission', '\*Common Fields Transaction Date' is '2024', 'Volunteer Submissions Volunteer Submission Status' is 'Approved' and 'Auto-Approved', and 'Volunteer Opportunities Volunteer Opportunity Name' is 'is not External Tracked Time'. Step 4 shows the 'Visualization' section with the table visualization selected. Step 5 shows the 'Run' button. The bottom part of the screenshot shows the resulting table visualization, which matches the data in the 'Top 5 Opportunities (Volunteering) by Hours' table above.

# View donation amounts by quarter

Use this chart to see the distribution of donation funds over each quarter. You can use this for budget planning and showing the impact of your campaigns.



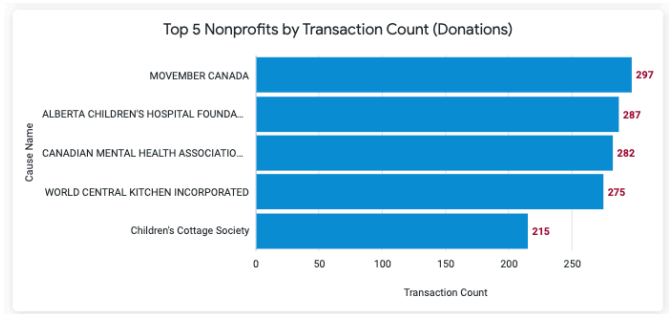
## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Donations Explore</b></li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>*Common Fields &gt; Transaction Date</b> <ul style="list-style-type: none"> <li>Add <b>Quarter</b></li> </ul> </li> <li>From <b>Converted Currency Amount &gt; Donations (Common Currency)</b> <ul style="list-style-type: none"> <li>Add <b>Total donation amount</b></li> </ul> </li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>*Common Fields</b> <ul style="list-style-type: none"> <li>Add <b>Transaction Year</b> → choose your desired date range</li> <li>Add <b>Transaction Type</b> → select is <b>Donation</b></li> <li>Add <b>Currency Display</b> → choose your desired currency</li> </ul> </li> <li>From <b>Transactions</b> <ul style="list-style-type: none"> <li>Add <b>Transaction Description</b> select is desired transactions</li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Adjust to <b>Pie</b></li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>

Transaction Quarter	Converted Currency Amounts Total Donation Amount
2024-Q4	316,995.92
2024-Q3	247,317.61
2024-Q2	206,582.31
2024-Q1	131,521.05

# Top Nonprofits by Transaction Count (Donations)

Use this bar chart to rank the top 5 nonprofits by donation count, identifying charities with the highest volume of donor activity.



## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Donation Explore</b></li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>Causes</b>:             <ul style="list-style-type: none"> <li>Add <b>Cause Name</b></li> </ul> </li> <li>From <b>Transactions</b> <ul style="list-style-type: none"> <li>Add <b>Transaction Count</b></li> </ul> </li> <li>Set <b>row limit</b> to 5 (found on the right side of the <b>Data</b> bar)</li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>*Common Fields</b>:             <ul style="list-style-type: none"> <li>Add <b>Transaction Type</b> → select <b>Donation</b></li> <li>Add <b>Transaction Date &gt; Date</b> → choose your desired date range</li> </ul> </li> <li>From <b>Transactions</b>:             <ul style="list-style-type: none"> <li>Add <b>Transaction Description</b> → select relevant donation types</li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Select <b>Bar</b></li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>

The screenshot shows the Benevity interface for creating a visualization. The visualization is titled "Top 5 Nonprofits by Transaction Count (Donations)".

**Filters:**

- \*Common Fields Transaction Date: is in the year 2024
- \*Common Fields Transaction Type: is Donation
- Transactions Transaction Description: is User Donation, External User Donation, User Rewards Donation, Client Direct Donation

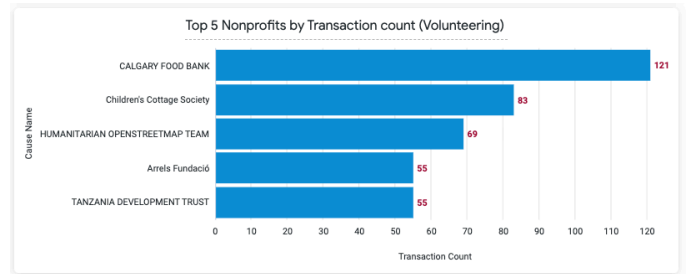
**Visualization:** Bar

**Data:** Row Limit 5

Causes Cause Name	Transactions Transaction Count 4	Totals
1 MOVEMBER CANADA		297
2 ALBERTA CHILDREN'S HOSPITAL FOUNDATION		287
3 CANADIAN MENTAL HEALTH ASSOCIATION - CALGARY REGION		282
4 WORLD CENTRAL KITCHEN INCORPORATED		275
5 Children's Cottage Society		215

# Top Nonprofits by Transaction Count (Volunteering)

Use this bar chart to rank the top 5 nonprofits by approved volunteer submissions, highlighting organizations receiving the most frequent support.



## Creating the visualization

<b>1. Explore</b>	<ul style="list-style-type: none"> <li>Select <b>Volunteer Explore</b></li> </ul>
<b>2. Data</b>	<ul style="list-style-type: none"> <li>From <b>Causes::</b> <ul style="list-style-type: none"> <li>Add <b>Cause Name</b></li> </ul> </li> <li>From <b>*Common Fields:</b> <ul style="list-style-type: none"> <li>Add <b>Transaction Count</b></li> </ul> </li> <li>Set <b>row limit</b> to 5 (found on the right side of the <b>Data</b> bar)</li> </ul>
<b>3. Filters</b>	<ul style="list-style-type: none"> <li>From <b>*Common Fields:</b> <ul style="list-style-type: none"> <li>Add <b>Transaction Type</b> → select <b>Volunteer Submission</b></li> <li>Add <b>Transaction Date &gt; Date</b> → choose your desired date range</li> </ul> </li> <li>From <b>Volunteer Submissions:</b> <ul style="list-style-type: none"> <li>Add <b>Volunteer Submission Status</b> → select <b>Approved, Auto-Approved</b></li> </ul> </li> <li>From <b>Causes:</b> <ul style="list-style-type: none"> <li>Add <b>Cause Name</b> → select <b>is not unknown</b></li> </ul> </li> </ul>
<b>4. Visualization</b>	<ul style="list-style-type: none"> <li>Select <b>Bar</b></li> </ul>
<b>5. Run</b>	<ul style="list-style-type: none"> <li>Select <b>Run</b> in the top-right corner.</li> </ul>

**Top 5 Nonprofits by Transaction count (Volunteering)**

5 rows · from cache · 13m ago  
 ● See performance details

**Volunteering** 1

Find a Field Search Options  
 Start typing to search

All Fields In Use

- Custom Fields + Add
- \*Common Fields 3
- Cause Projects
- Causes 1
- Company
- Giving Opportunities
- Tags
- Users
- Volunteer Opportunities
- Volunteer Shifts
- Volunteer Sign-ups
- Volunteer Submissions 1

**Filters** 3

- \*Common Fields Transaction Type is Volunteer Submission
- \*Common Fields Transaction Date is in the year 2024
- Volunteer Submissions Volunteer Submission Status is Approved, Auto-Approved
- Causes Cause Name is not Unknown

+ Filter

+ New group + Custom expression

**Visualization** 4

Bar chart showing Top 5 Nonprofits by Transaction count (Volunteering):

Cause Name	Transaction Count
CALGARY FOOD BANK	121
Children's Cottage Society	83
HUMANITARIAN OPENSTREETMAP TEAM	69
Arrels Fundació	55
TANZANIA DEVELOPMENT TRUST	55

**Data** 2

Row limit reached. Results may be incomplete

Causes Cause Name	*Common Fields Transaction Count
1 CALGARY FOOD BANK	121
2 Children's Cottage Society	83
3 HUMANITARIAN OPENSTREETMAP TEAM	69
4 Arrels Fundació	55
5 TANZANIA DEVELOPMENT TRUST	55