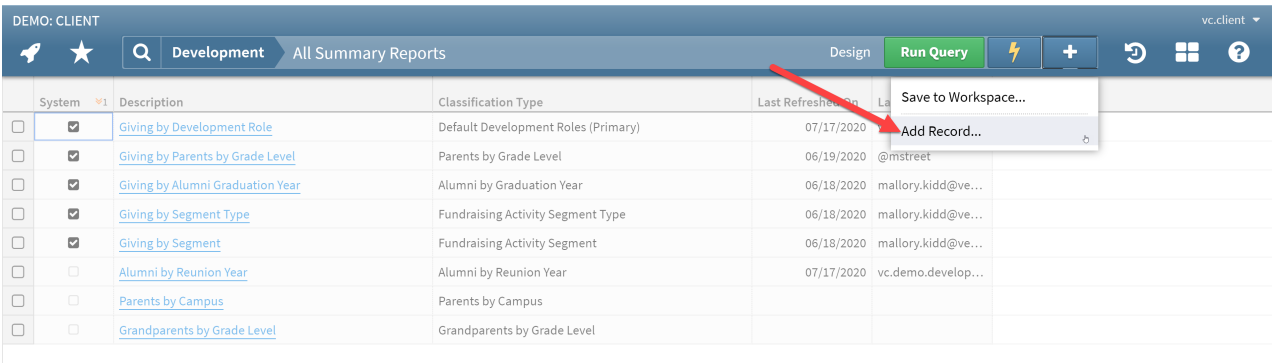


How can I add a new Summary Report in Development 3.0?

Updated Jul 16, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. Q&A articles are only visible to authenticated users in the Veracross Community; please speak with your implementation or account manager for additional information.



DEMO: CLIENT

Development All Summary Reports

Design Run Query +

System	Description	Classification Type	Last Refreshed On	Last Refreshed By
<input checked="" type="checkbox"/>	Giving by Development Role	Default Development Roles (Primary)	07/17/2020	
<input checked="" type="checkbox"/>	Giving by Parents by Grade Level	Parents by Grade Level	06/19/2020	@mstreet
<input checked="" type="checkbox"/>	Giving by Alumni Graduation Year	Alumni by Graduation Year	06/18/2020	mallory.kidd@ve...
<input checked="" type="checkbox"/>	Giving by Segment Type	Fundraising Activity Segment Type	06/18/2020	mallory.kidd@ve...
<input checked="" type="checkbox"/>	Giving by Segment	Fundraising Activity Segment	06/18/2020	mallory.kidd@ve...
<input type="checkbox"/>	Alumni by Reunion Year	Alumni by Reunion Year	07/17/2020	vc.demo.develop...
<input type="checkbox"/>	Parents by Campus	Parents by Campus		
<input type="checkbox"/>	Grandparents by Grade Level	Grandparents by Grade Level		

Save to Workspace...
Add Record...

Summary reports are used to create reports based on development classifications to analyze giving, counts, participation, and other metrics. To add a new Summary Report in Development 3.0, perform the following steps:

1. From the Development homepage, click on the [All Development Summary Reports](#) query. This query lists all of your existing Summary Reports.
2. To add a new one from here, click on the organize button (+), which is next to the action button (the lightning bolt), and click "Add Record..."
3. From here, fill in the necessary information: specifically, the description and classification type, and when done hit the green "Add Development Summary Report" button and you're all set! You should then see this new report show on the list with the others.