

Reporting on Contacts

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If you'd like to view all of the biographical data about your contacts in one sheet you can easily create a custom report. You can also do this by exporting your contact data, but the custom report will give you additional options for what fields you'd like, and filters for what contacts to include. If you have not yet seen [our article about creating custom reports](#), it's a great place to start to familiarize yourself with the report builder and it's features.

Building Your Custom Report

To get started, navigate to Reports and choose Custom Reports. You can then create a new custom report. This is a four step process where you will name the report, add columns, set filters, and then optionally group and sort the report for your preferences.

1. **In step 1 you first choose a name for your report.** You can name it whatever you'd like; this is the name that will be displayed when you access the saved report in the future. Also, be sure that you choose Contacts as the reporting area. This means that you'll add fields and columns that are unique to contacts like name, email, phone, etc, and not things like animals, crops, etc.
2. **In Step 2 you'll decide what data you'd like to see on the report.** This of this as somewhat like building a spreadsheet. The fields you pick will be the columns, and each row on the report will be a different contact. You might add columns like name, email, address, phone number, and more. You can use the Add All button if you'd like all the possible information shown.
3. **Step 3 lets you set filters to only return specific contacts on the report.** You might only want to see contacts from a specific company, or maybe find all contacts who are marked as wholesale customers.
4. **In Step 4 you'll option all set preferences, which allow you to sort, group, and total the report.** Maybe you group them by company and sort them alphabetically.

Once you have configured your report, you can run it by clicking Save in the bottom right. The report is automatically saved so you can easily run it again in the future. You'll see it as a link on the Custom Reports dashboard in the future.

- Schedule
- Tasks
- Livestock
- Plantings
- Resources
- Accounting
- Market
- Contacts
- Farm Map
- Climate
- Reports

- 7 Inventory Alerts
×
- 29 Overdue Tasks
×
- 3 Upcoming Appointments
×
- 1 Location Ready to Graze
×

WEATHER FOR AURORA

74°F

Broken Clouds - H 84°F L 56°F
Sunset: 6:34PM
Wind: 5 mph
Humidity: 29%

Feels like 72°F
Sky Cover: 69%
1-Hr Precip: 0mm

Hourly

Daily

11AM	12PM	1PM	2PM	3PM	4PM
75°F 3mph 0.0%	77°F 3mph 0.0%	79°F 4mph 0.0%	82°F 4mph 0.0%	84°F 5mph 0.0%	84°F 5mph 0.0%

- TOP UPCOMING TASKS
- ✓

Branding and Tagging Livestock
Progress

View Animal
Due Jun. 18, 2026

✓

Branding and Tagging Livestock
Progress

View Animal

RECENT ORDERS

Not Enough Data to Chart