Salesforce Reports Or Is it That Easy? Part 1

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# **1** SALESFORCE REPORTS – GETTING OUTSIDE THE WINDOW



As seen in the earlier training modules, using *Search* is a quick way to find information about individuals or groups of individuals. This information is contained on Salesforces screens.

Like looking through a window, Salesforce screens give you a partial view.

Salesforce Reports get you outside the window.

When you need a complete picture, use Salesforce Reports, not just information from screens.

## 1.1 OBJECTS, RECORDS AND REPORTS

#### 1.1.1 An Object is a grouping of related fields

We have talked about the Salesforce Object Model. Understanding the Object Model helps you avoid confusion over the complexity of details in Salesforce.



As shown above, objects are categories of related information. Each granule of information is defined in a field. The name of the object gives a general idea of the category of information. But looking at the fields contained in an object help you get to know it.



For example: An object called, "*Dog*" might have the fields: Name, *Breed, Sex, Color, Height, Weight*.

#### 1.1.2 Objects can be mapped to spreadsheets



#### 1.1.3 A record is an instance of an object



As shown above, an instance of an object has values in the fields. Example: An instance of a Dog object, named Snoopy has values representing a description of Snoopy.

You can have many instances of an Object. For example, one for each dog.

#### 1.1.4 Records can be mapped to rows on a spreadsheet

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A	A	В	C	D	E	F	-
1	Name	Breed	Sex (M/F)	Color	Height (inches)	Weight (lbs)	
2	Snoopy	Beagle	M	B&W Spots	12	17	7
3	Snowflake	Husky	F	White, Gray	24	30	0
4	Terminator	Chihuahua	M	Brown, Black	7	8	3

As shown above, each row is an instance of a Dog object.

An Object, with all its Records, can be represented as a Table, or Spreadsheet. A Database is made up of multiple, related Tables.

1.1.5 Reports are views of information based on Objects and Records

Information can come from one or more related Tables Information can be filtered for subsets of information Information can be summarized from groups of records

We will look at this further in the following sections.

### **1.2 REPORTS – A WHOLE STORE OF PERSPECTIVES**

As you saw in *Section 1.5* of the "*Salesforce Query*" training module, Salesforce has hundreds of already-built reports, as well as a number of dashboards that can be used, out of the box. Likewise, many reports have been customized and/or built from scratch for Project Onward.

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My Personal Dashboards     Household Reports (Installed Package: Hou     Nonprofit Edition Reports (Installed Package     Nonprofit Edition Reports (Installed Package     Nonprofit Edition Reports	•	Organization Giving This report summarizes Donations (all types) by Organization, but excludes Art Sales.	ProjectOnw	ard Reports
NPSP Donor Management Dashboard		Opportunities Donations / Art Sales	ProjectOnw	ard Reports
NPSP Grants Management Dashboard NPSP Grants Management Reports NPSP Health Check (Installed Package: Non NPSP Membership Management Dashboard NPSP Membership Management Reports	۲	Opportunities by Household This report summarizes giving plus art sales by household. Note that Households can have duplicate names, so the report summarizes by Household ID, instead of Household Name (which is why Househol are not in sorted order).	ProjectOnw	ard Reports
Sales Reports		Copportunities - Donations (no Art Sales)	ProjectOnw	ard Reports
Lead Reports		Dpportunities - Art Sales (no Donations)	ProjectOnw	ard Reports
Support Reports Self-Service Reports	•	Households Giving Report This report summarizes Donations (all types) by Household, but excludes Art Sales.	ProjectOnw	ard Reports
Concenter response		Donor Year on Year Comparison tunning total on monthly donations compared over years	ProjectOnw	ard Reports
Administrative Reports Administrative Reports Activity Reports File and Content Reports	•	Donations by Contact Zip This Year All Closed Won Opportunities grouped by Primary Contact Role -> Contact Mailing Address Zip / Postal Code, filtered by current year.	ProjectOnw	ard Reports

As shown above, the folders on the left each contain a number of reports pertaining to the category. Because Salesforce is used by companies and organizations of all types, many of the reports do not apply to us. Other categories of reports are used more for Salesforce administration. But **the reports that are most useful for Project Onward have been gathered into the** "*ProjectOnward Reports*" folder at the top left (red arrow). Many of these reports have been built from scratch, or customized to get at specific information for Project Onward.

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#### 1.2.1 Run a Report – Giving by Organization Example

Running a report is as easy as finding it and clicking on it.

Folders	Project	Driward Reports
Q, Find a folder	Q. Find	reports and dashboards
All Folders	Action	Name +
ProjectOnward Reports		Accounts and Contacts
C Unfiled Public Reports		Campaigns
My Personal Custom Reports		Contacts with Dontations
Campaign Monitor for Salesforce (Insta	•	Opportunities - all kinds
Campaign Monitor for Salesforce (Insta Household Reports (Installed Package:	5	Organization Giving Gifts fields include all types of donations, and exclude Art Sales
MailChimp for Salesforce (Installed Pack		Crganizational Accounts
Reports (Installed Pack		T Volunteers

As pictured above, click on the "ProjectOnward Reports" folder on the left, then on the "Organization Giving" Report on the right. (Note that the gray text tells you that "*Giving*," in this report, means all money coming in **EXCEPT** *Art Sales*.)

#### 1.2.2 Always Check the Report Options at the Top

Report Options Summarize Info None	tmation by:	~	Show All accounts		ime Frame — ate Field Created Date		Rar V Cur	ige itom	To	2		
							1/1	2010	12/31/2025			
Run Report	Hide Details	Customize	Save Save	As Delet	e Printable V	/iew Export D	etails Sub	scribe				
1												
Filtered By: Account I	Edit Record Type equ	ials Organiza	tion Clear									
	Primary Contact	Total Gifts	Total Gifts	Total Gifts	Total	Total Gifts Two	Largest Gift	Average	First Gift	Last Gift	Phone	Biling
Account Name			Last N Days	Last year	Year	IDDIO MYD		Gitt	Date	Date		Sucor
Account Name Dave's Charitable Trust	Dave Lindstrom	\$5,000.00	S0.00	Last Year \$0.	Year 00 \$0.00	\$5,000.00	\$5,000.00	55,000.00	3/21/2016	3/21/2016	•	333 S. Wacker
Account Name Dave's Charitable Trust Al's Bait Shop	Dave Lindstrom ALFlybait	\$5,000.00 \$1,000.00	\$1,000.00	50. \$1,000.	Onis mis           Year           00         \$0.00           00         \$0.00	\$5,000.00 \$0.00	\$5,000.00	\$5,000.00 \$1,000.00	3/21/2016 8/14/2017	3/21/2016 8/14/2017	-	333 S. Wacker 2999 Main St.
Account Name Dave's Charitable Trust Al's Bait Shop ComEd Fakeout	Dave Lindstrom Al Flybait George Washington	\$5,000.00 \$1,000.00 \$15,000.00	\$1,000.00 \$5,000.00	Last Year 50. \$1,000. \$5,000.	Visit         Nis           Year         00         \$0.00           00         \$0.00         \$0.00           00         \$0.00         \$0.00	\$5,000.00 \$0.00 \$0.00	\$5,000.00 \$1,000.00 \$10,000.00	<ul> <li>\$5,000.00</li> <li>\$1,000.00</li> <li>\$7,500.00</li> </ul>	3/21/2016 8/14/2017 7/15/2015	3/21/2016 8/14/2017 6/21/2017		333 S. Wacker 2999 Main St. 4444 Main Street

For every report, it is important to first check the Report Options (red box, above), and adjust them as needed.

*Summarize information* by – Leave this as, "—None—," until you are more proficient with *advanced reporting.* 

**Show** – Leave this as "All accounts." At Project Onward, we don't currently have teams of people working groups of transactions or accounts. If we did, you could use this field to filter the report to a subset of accounts, such as "My accounts."

#### Time Frame

For Project Onward reports, you can make sure that your report will include ALL records by using "*Created Date*," and setting the *Range* to arbitrarily low and high dates. For most reports, I use a *Custom* range on the Created Date field, and set the dates from 1/1/2010 to 12/31/2025.

**Note that I can filter the report by any combination of these fields.** For example, for Opportunities, I might only want to include Opportunities from this Fiscal Year. In that case, I would change the Date Field to "Closed Date" (the date of the transaction), and set the date range from 7/1/2017 to 6/30/2018. We will see this in another example.

#### 1.2.3 What is on the Screen is <u>NOT</u> the Report

#### What you see on the screen is a <u>representation</u> of the report.

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Report Options				1224								
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45							From 1/1/2	n 2010	To 12/31/2025	<u></u>		
Run Report	Hide Details	Customize	Save Save	As Belete	Printable V	liew Export D	etails Subs	cribe				
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Filtered By: Account I	Edit Record Type equ	ials Organiza	tion Clear									
Filtered By: Account I Account Name	Edit Record Type equ Primary Contact	ials Organiza Total Gifts	tion Clear Total Gifts Last N Days	Total Gifts Last Year	Total Gifts This Year	Total Gifts Two Years Ago	Largest Gift	Average Gift	First Gift Date	Last Gift Date	Phone	Biling Street
Filtered By: Account I Account Name Dave's Charitable Trust	Edit Record Type equ Primary Contact Dave Lindstrom	Total Gifts \$5,000.00	tion Clear Total Gifts Last N Days \$0.00	Total Gifts Last Year \$0.00	Total Gifts This Year ) \$0.00	Total Gifts Two Years Ago \$5,000.00	Largest Gift \$5,000.00	Average Gift \$5,000.00	First Gift Date 3/21/2016	Last Gift Date 3/21/2016	Phone	Biling Street 333 S. Wacker
Filtered By: Account I Account Name Dave's Charitable Trust Al's Bait Shop	Edit Record Type equ Primary Contact Dave Lindstrom AL Flybatt	Total Gifts \$5,000.00 \$1,000.00	tion Clear Total Gifts Last N Days \$0.00 \$1,000.00	Total Gifts Last Year \$0.00 \$1,000.00	Total Gifts This Year 50.00 \$0.00	Total Gifts Two Years Ago \$5,000.00 \$0.00	Largest Gift \$5,000.00 \$1,000.00	Average Gift \$5,000.00 \$1,000.00	First Gift Date 3/21/2016 8/14/2017	Last Gift Date 3/21/2016 8/14/2017	Phone -	Billing Street 333 S. Wacker 2999 Main St.
Filtered By: Account I Account Name Dave's <u>Charitable</u> Trust Al's Bait Shop <u>ComEd</u> Fakeout	Edit Record Type equ Primary Contact Dave Lindstrom Al Flybait George Washington	Total Gifts \$5,000.00 \$1,000.00 \$15,000.00	tion Clear Total Gifts Last N Days \$0.00 \$1,000.00 \$5,000.00	Total Gifts Last Year 50.00 \$1,000.00 \$5,000.00	Total Gitts This Year 0 \$0.00 0 \$0.00 0 \$0.00	Total Gifts Two Years Ago \$5,000.00 \$0.00 \$0.00	Largest Gift \$5,000.00 \$1,000.00 \$10,000.00	Average Gift \$5,000.00 \$1,000.00 \$7,500.00	First Gift Date 3/21/2016 8/14/2017 7/15/2015	Last Gift Date 3/21/2016 8/14/2017 6/21/2017	Phone - -	Biling Street 333 S. Wacker 2999 Main St. 4444 Main Street

To see the actual Report, you must first "Run" the report, then "Print" or "Export" the report (red arrows, above).

- 1. Click the "Run Report" button. (The screen may or may not change.)
- 2. Click either:
  - a. **The "Printable view" button** To bring-up the actual report in a web browser (from which you can print it).
  - b. **or the "Export Details" button** to export the report to a ".csv" file, which can be brought up in a Spreadsheet program, like Microsoft Excel.

#### 1.2.4 Sort the information by the column

When you are on the report screen, as above, you can always click on a Column Heading, to sort the information by what is in the column. (Click again, to reverse the order – example: largest to smallest, or smallest to largest.)

Account Name	Primary Contact	Total Gifts	Total Gifts Last N Days	Total Gifts Last Year	Total Gifts This Year	Total Gifts Two Years Ago	Largest Gift	Average Gift	First Gift Date	Last Gift Date
ComEd Fakeout	<u>George</u> <u>Washington</u>	\$15,000.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$10,000.00	\$7,500.00	7/15/2015	6/21/2017
Dave's Charitable Trust	Dave Lindstrom	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00	\$5,000.00	\$5,000.00	3/21/2016	3/21/2016
Al's Bait Shop	Al Flybait	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	8/14/2017	8/14/2017
Trump Towers	Donald Trump	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	9/4/2017	9/4/2017
Grand Totals	(4 records)									

For example, as shown above, I clicked on "*Total Gifts*" (red arrow), and it sorted the records with the smallest amount at the top. I clicked again, and it reversed the order of the records, with the largest amount at the top (as shown above.)

Since I changed the screen, I then click on the "*Run Report*" button, again. Then on the "*Printable View*" or "*Export Details*" button, to see the actual report.

#### 1.2.5 Then Print or Export the Report

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lun Report 🔻	Hide Details	Customize	Save Save	As Delete	Printable V	fiew Export De	etails Subso	ribe			Open with	Firefox (default)				~
Filtered By:	Edit Record Type equ	als Organizat	lion Clear		U					Γ	Do this <u>a</u> ute	amatically for files like	e this fr	om now or		
Filtered By: Account H	Edit Record Type equ Primary Contact	ials Organizat Total Gifts	tion Clear Total Gifts Last N Days	Total Gifts Last Year	Total Gifts This Year	Total Gifts Two Years Ago	Largest Gift	Average Gift	First Gift Date	Lat Dat	Do this <u>a</u> ute	omatically for files like	e this fr	om now or OK		Cancel
Filtered By: Account I account Name	Edit Record Type equ Primary Contact <u>George</u> Washington	Total Gifts + \$15,000.00	Total Gifts Last N Days \$5,000.00	Total Gifts Last Year \$5,000.00	Total Gifts This Year \$0.00	Total Gifts Two Years Ago \$0.00	Largest Gift \$10,000.00	Average Gift \$7,500.00	First Gift Date 7/15/2015	Lat Dat	Do this <u>a</u> uto	amatically for files like <u> 4 Pottersville</u> n ret	e this fr	om now or OK		Cancel
Filtered By: Account I Account Name ComEd akeout	Edit Record Type equ Primary Contact <u>George</u> <u>Washington</u> <u>Dave</u> Lindstrom	als Organizal Total Gifts + \$15,000.00 \$5,000.00	tion Clear Total Gifts Last N Days \$5,000.00 \$0.00	Total Gifts Last Year \$5,000.00 \$0.00	Total Gitta This Year \$0.00	Total Gifts Two Years Ago \$0.00 \$5,000.00	Largest Gift \$10,000.00 \$5,000.00	Average Gift \$7,500.00 \$5,000.00	First Gift Date 7/15/2015 3/21/2016	E 21/2017 3/21/2016	Do this guto add Mai Stri - 333 Wa	A Pottersville     Normatically for files like	e this fr	om now or OK		Cancel
Filtered By: Account I ccount Name omEd akeout lave's haritable tust ts Bait Shop	Edit Record Type equ Primary Contact <u>George</u> <u>Washington</u> Dave Lindstrom Al Flybalt	rais Organizal Total Gifts + \$15,000.00 \$5,000.00 \$1,000.00	tion Clear Total Gifts Last N Days \$5,000.00 \$0.00 \$1,000.00	Total Gifts Last Year \$5,000.00 \$0.00 \$1,000.00	Total Gifts This Year \$0.00 \$0.00 \$0.00	Total Gifts Two Years Ago S0.00 \$5,000.00 \$0.00	Largest Gift \$10,000.00 \$5,000.00 \$1,000.00	Average Gift \$7,500.00 \$5,000.00 \$1,000.00	First Gift Date 7/15/2015 3/21/2016 8/14/2017	21/2017 3/21/2016 8/14/2017	Do this <u>a</u> uto - <u>444</u> - <u>343</u> - <u>333</u> Wa - <u>295</u> Mai	A Pottersville     A Pottersville     N     S. Chicago     Ker     Montgomery     SL	e this fr	om now or OK		Cancel - -

After clicking on the "Run Report" button again, I have clicked on the "Printable View" button (as above). The dialog allows me to either open the report in a web browser, or Save it (as an .html file) to a local folder. I chose to Open the report in a web browser.

#### 1.2.6 Now I have a Report

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Account Name ComEd fakeout Dave's Charitable frust Al's Bait Shop	Date Field: ( Account Rec Primary Contact George Washington Dave Lindstrom Al Flybait	Control Date ( cord Type equ Total Gifts \$15,000.00 \$5,000.00 \$1,000.00	equals Custo als Organiza Total Gifts Last N Days \$5,000.00 \$0.00 \$1,000.00	m (1/1/2010 ttion Total Gifts Last Year \$5,000.00 \$0.00 \$1,000.00	to 12/31 Total Gifts This Year \$0.00 \$0.00 \$0.00	/2025) Total Gifts Two Years Ago \$0.00 \$ \$5,000.00 \$0.00	Largest Gift \$10,000.00 \$ \$5,000.00 \$ \$1,000.00 \$	Average Gift \$7,500.00 \$5,000.00 \$1,000.00	First Gift Date 7/15/2015 3/21/2016 8/14/2017	Last Gift <sub>Phot</sub> Date 6/21/2017- 3/21/2016- 8/14/2017-	Billing Street 4444 Main Street 333 S. Wacker 2999 Main St	Billing City Pottersville Chicago Montgomer	Billing State/Province IL IL yAL	Billing Zip/Post: Code - -	al Bi	illing ountr;

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The complete Report now shows in my Web Browser (as shown above). In this example, it shows the same information as what was on the screen. However, in a situation with lots of records, the Report is complete (whereas the screen may not show everything).

#### 1.2.7 Use File > Print, or File > Save As, in your Web Browser



# As shown above, to Print the report, click on "File" in the upper-left of your Web Browser, then click on "Print..."

(Alternatively, to Save the report as an .html file, that can be brought up in a Web Browser, click on "Save Page As...")

#### 1.2.8 Be careful – It's best to Print to PDF First

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Organizat	ion Giving	Print				×
Generate	d By:	Printer				
David Li	ndstrom	Name	PDFCreator	~	Properties	8
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	Date Field: Created Dat	Print ranges	PDFCreator	OIOFMER MIT/50		
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Account	Primary Tot	() Pages	from: 1 to: 1		Sa Picata	
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Long reports can use lots of paper. It is better to Print to PDF first! (as described in *Section 2.5.3* of the "*Computer Survival Skills*" training module).

As shown above, you can choose to print to PDF instead of to a printer. (For Windows computers, you may need to first load a PDF utility. See the reference in the above *Computer Survival Skills* module. On Macs, you may have the "Print to File" option). This allows you to see how many pages will get printed. From your PDF utility, you can then decide to print all the pages, or maybe just some of them to a printer.