

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.

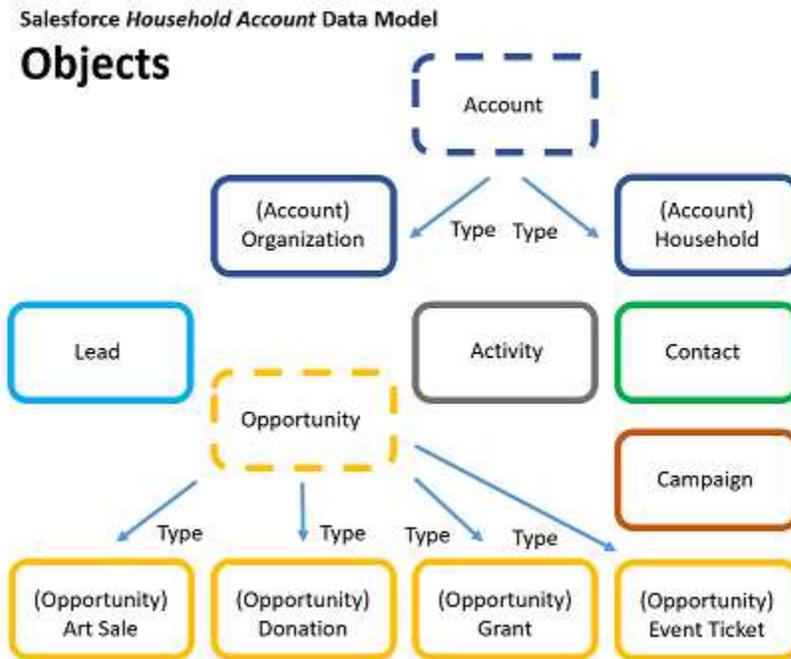
Salesforce Reports get you outside the window.

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.

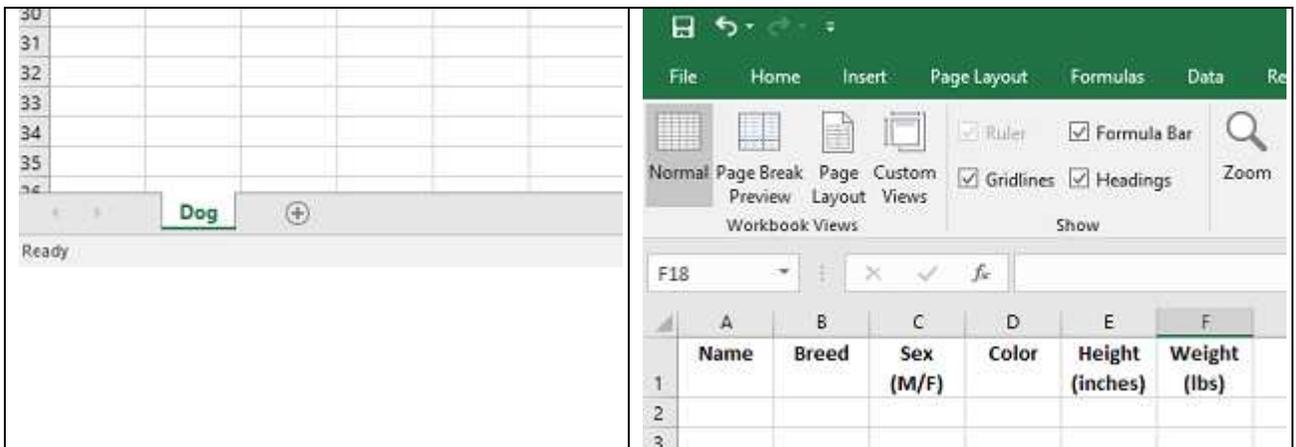


As shown above, objects are categories of related information. Each granule of information is defined in a field. The name of the object gives a general idea of the category of information. But looking at the fields contained in an object help you get to know it.



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

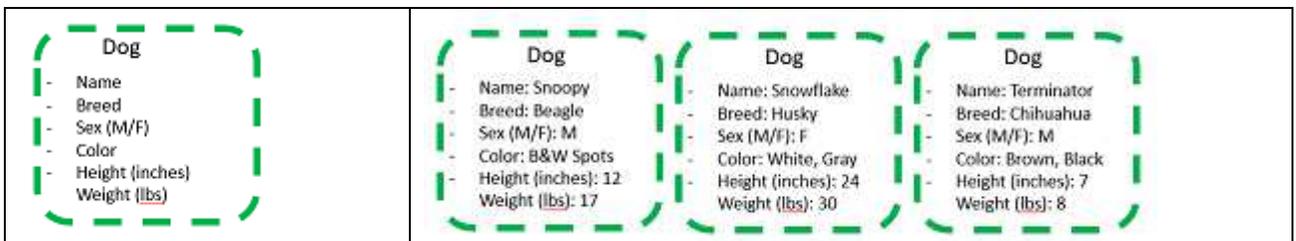
1.1.2 Objects can be mapped to spreadsheets



The Dog object is like a tab on a spreadsheet

The fields are like Column Heads

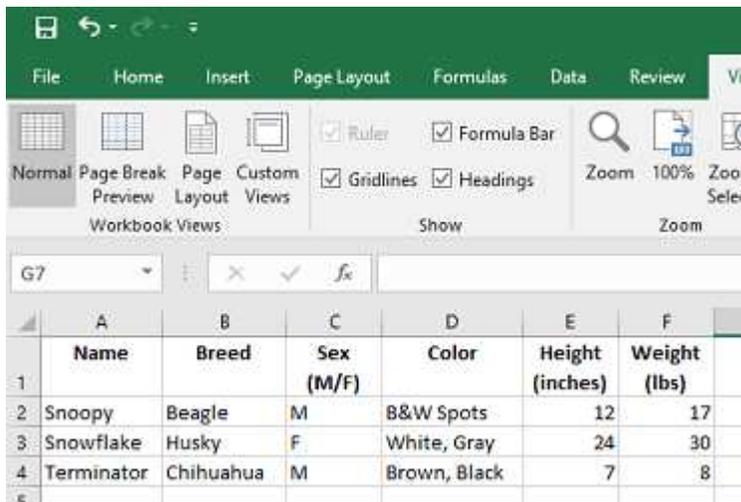
1.1.3 A record is an instance of an object



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



The screenshot shows the Microsoft Excel interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, and View. The Home ribbon is active, showing options for Normal, Page Break Preview, Page Layout, and Custom Views. There are checkboxes for Ruler, Formula Bar, Gridlines, and Headings. The Zoom is set to 100%. The active cell is G7. The spreadsheet data is as follows:

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

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.

Action	Name	Folder
	Volunteers Volunteers and info	ProjectOnward Reports
	Organization Accounts	ProjectOnward Reports
	Organizational Accounts	ProjectOnward Reports
	Organization Giving This report summarizes Donations (all types) by Organization, but excludes Art Sales.	ProjectOnward Reports
	Opportunities Donations / Art Sales	ProjectOnward Reports
	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 Households are not in sorted order).	ProjectOnward Reports
	Opportunities - Donations (no Art Sales)	ProjectOnward Reports
	Opportunities - Art Sales (no Donations)	ProjectOnward Reports
	Households Giving Report This report summarizes Donations (all types) by Household, but excludes Art Sales.	ProjectOnward Reports
	Donor Year on Year Comparison running total on monthly donations compared over years	ProjectOnward 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.	ProjectOnward 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.

sadfsad

1.2.1 Run a Report – Giving by Organization Example

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

Reports & Dashboards [New Report...](#) [New Dashboard...](#)

Find a folder...

All Folders

- ProjectOnward Reports
- Unfiled Public Reports
- My Personal Custom Reports
- My Personal Dashboards
- Campaign Monitor for Salesforce (Insta
- Campaign Monitor for Salesforce (Insta
- Household Reports (Installed Package:
- IATS Brickwork Reports (Installed Pack
- MailChimp for Salesforce (Installed Paci
- Nonprofit Edition Reports (Installed Pac

ProjectOnward Reports

Find reports and dashboards...

Action	Name
▼	Accounts and Contacts
▼	Campaigns
▼	Contacts with Donations
▼	Opportunities - all kinds
▼	Organization Giving Gifts fields include all types of donations, and exclude Art Sales.
▼	Organizational Accounts
▼	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

Organization Giving

Report Generation Status: Complete

Report Options:

Summarize information by: Show:

Time Frame: Range:

From: To:

[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details](#) [Subscribe](#)

Filtered By: [Edit](#)
Account Record Type equals Organization [Clear](#)

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	Phone	Billing Street
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	-	333 S. Wacker
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	-	2999 Main St.
ComEd Fakeout	George Washington	\$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	-	4444 Main Street
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	-	123 Main St.

Grand Totals (4 records)

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 NOT the Report

What you see on the screen is a representation of the report.

Organization Giving

Report Generation Status: Complete

Report Options:

Summarize information by: Show:

Time Frame: Date Field: Range:
From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: [Edit](#)
Account Record Type equals Organization [Clear](#)

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	Phone	Billing Street
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	-	333 S. Wacker
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	-	2999 Main St.
ComEd Fakeout	George Washington	\$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	-	4444 Main Street
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	-	123 Main St.
Grand Totals (4 records)												

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	George Washington	\$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 Bail 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

Organization Giving

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show: All accounts Time Frame: Date Field: Created Date Range: Custom From: 1/1/2010 To: 12/31/2025

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit Account Record Type equals Organization Clear

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	Phone	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country
ComEd Fakeout	George Washington	\$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		4444 Main Street	Pottersville	IL	-	-
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		333 S. Wacker	Chicago	IL	-	-
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		2999 Main St.	Montgomery	AL	-	-
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		123 Main St.	Oblong	IL	-	-
Grand Totals (4 records)																

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

Organization Giving

Generated By:
David Lindstrom
Project Onward
2/21/2018 2:24 PM

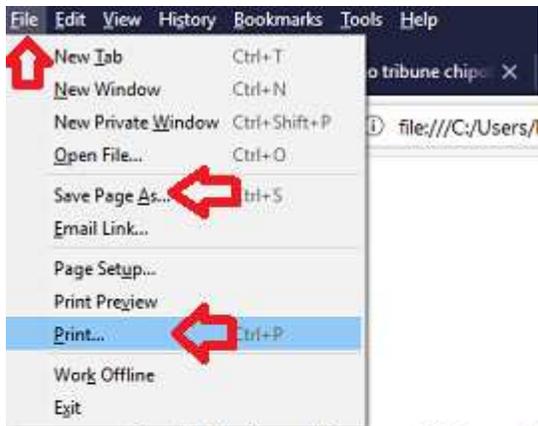
Filtered By:
Show: All accounts
Date Field: Created Date equals Custom (1/1/2010 to 12/31/2025)
Account Record Type equals Organization

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	Phone	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country
ComEd Fakeout	George Washington	\$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		4444 Main Street	Pottersville	IL	-	-
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		333 S. Wacker	Chicago	IL	-	-
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		2999 Main St.	Montgomery	AL	-	-
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		123 Main St.	Oblong	IL	-	-
Grand Totals (4 records)																

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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



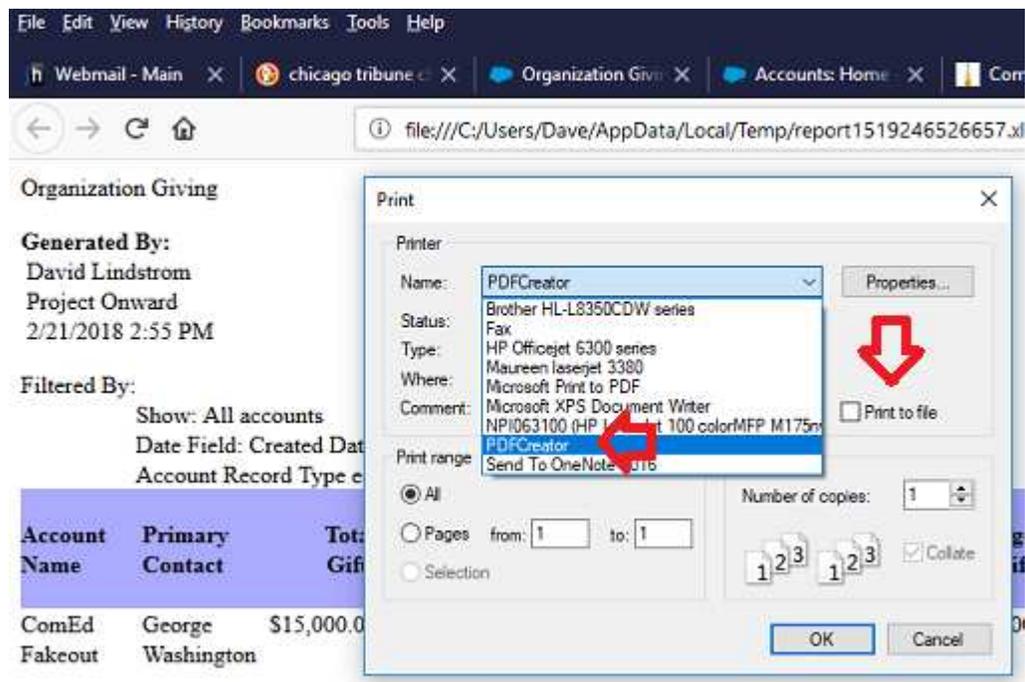
Date Field: Created Date equals Custom (1
Account Record Type equals Organization

Account Name	Primary Contact	Total Gifts	Total Gifts Last N Days	Total La
ComEd	George	\$15,000.00	\$5,000.00	\$5,
Fakeout	Washington			

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



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.**