

Salesforce Reports
Or
Is it That Easy?
Part 2

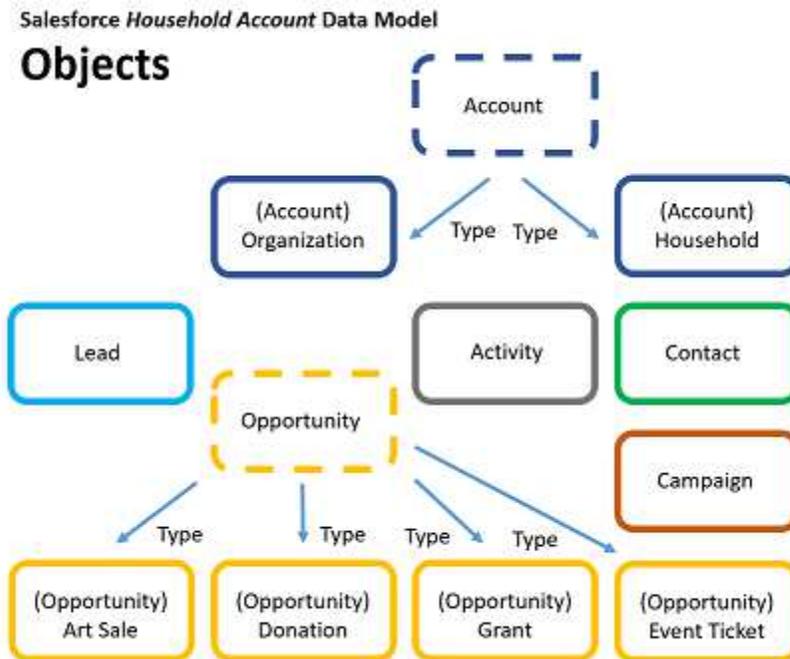
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1 SALESFORCE REPORTS – GETTING OUTSIDE THE WINDOW

1.1 CUSTOMIZING OF REPORTS – THINK ABOUT THE OBJECT MODEL

Salesforce also has a Report-Building and Customizing environment, so that reports can be customized, or new reports can be tailored and/or built from scratch for Project Onward needs.



Salesforce reports are built off of the Object Model. Remembering the object that you want to work with will greatly simplify report customization and building.

1.1.1 Household Giving example

To create a Household Giving report, we look for a close report to modify. By close, we mean one build from the same object. From the Object Model above, we see that Household and Organization are both *Account* objects. That is, they are both types of the same object.

Reports & Dashboards

[New Report...](#) [New Dashboard...](#)

The screenshot shows the Salesforce Reports & Dashboards interface. On the left, the 'Folders' pane is open, showing a list of folders under 'All Folders'. The 'ProjectOnward Reports' folder is selected. A red arrow points to the 'My Personal Custom Reports' folder. On the right, the 'ProjectOnward Reports' pane is open, showing a list of reports. A red circle highlights the dropdown arrow next to the 'Organization Giving' report. A red arrow points to the 'Organization Giving' report name.

An easy way to customize a report is to take an existing report and manipulate it. **As shown above, since there is already an Organizational Giving report, we will start with this.** We can assume that it is built from the *Account* object – the same as needed for our new Household Giving report.

1.1.2 Before customizing, always SAVE to your “Personal Custom Reports”

Reports & Dashboards

[New Report...](#) [New Dashboard...](#)

This screenshot is identical to the one above, showing the Salesforce Reports & Dashboards interface. The 'Folders' pane on the left has 'ProjectOnward Reports' selected, with a red arrow pointing to 'My Personal Custom Reports'. The 'ProjectOnward Reports' pane on the right shows a list of reports, with a red circle highlighting the dropdown arrow next to 'Organization Giving' and a red arrow pointing to the report name.

We will modify the “Organizational Giving” report (red arrow, above right). Before doing this, we will save the report to the “*My Personal Custom Reports*” folder (red arrow, above left). This is your own personal folder of customized reports. Only you will see these, and be able to run them.

To do this, first click on the arrow to the left of the report name (red circle, above). Then click on “*Edit*.”

We are now in the Report Editor view.

Report Type: Accounts
Organization Giving

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Quick Find

Drag and drop to add fields to the report.

Bucket Fields

- Account General
 - Account Owner
 - Account Owner Alias
 - Created By
 - Created Alias
 - Last Modified By
 - Last Modified Alias
 - Account Name
 - Account Site
 - Annual Revenue
 - Type
 - Account Record Type
 - Ticker Symbol

Filters Add

Show All accounts

Date Field Created Date Range Custom From 1/1/2010 To 12/31/2025

Account Record Type equals "Organization"

Preview Tabular Format Show Remove All Columns

Account Name	Primary Contact	Total Gifts	Total Gifts Last N Days	Total Gifts Last Year	Total Gifts
Al's Bait Shop	Al Flybait	\$1,000.00	\$1,000.00	\$0.00	
ComEd Fakeout	George Washington	\$10,000.00	\$0.00	\$0.00	
Trump Towers	Donald Trump	\$0.00	\$0.00	\$0.00	
Dave's Charitable Trust	Dave Lindstrom	\$5,000.00	\$0.00	\$0.00	
Grand Totals (4 records)					

This preview shows a limited number of records. Run the report to see all results.

As shown above (red circle), the Report Type is *Accounts*. That is, it is built from the Account object. The left pane shows the Account object and the fields available to us. The report (shown on the right) was built from dragging fields to column heads (as seen in the "Account Name" field). We will look at this further in the following sections.

As noted above, before we do anything, we should Save the report to our Custom Reports Folder. Click the Save As button (red arrow).

A dialog should pop-up, allowing you to name your new report.

Save Report As Help for this Page

Report Name Household Giving

Report Unique Name Household_Giving

Report Description Giving by Household (no Organization accounts included)

Report Folder My Personal Custom Reports

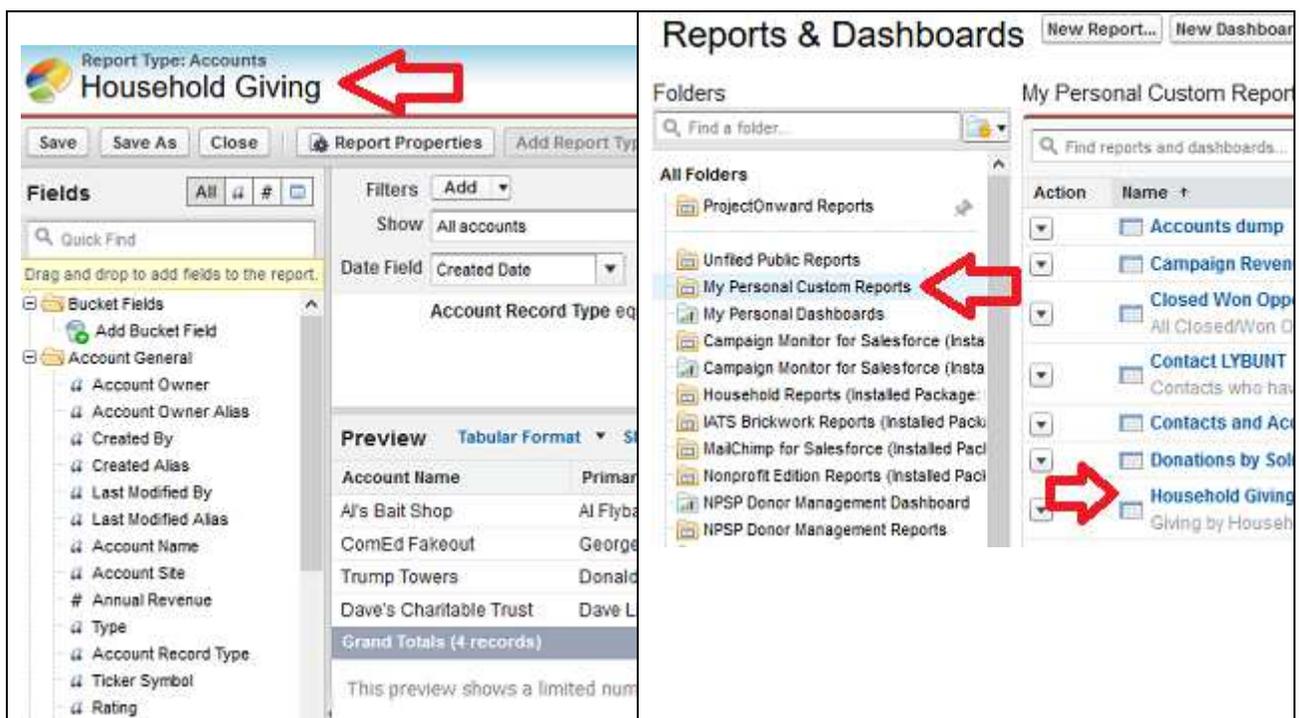
Save Save and Run Report Cancel

As shown above, give it the name, "Household Giving," on the top line.

The second line will be automatically generated. This is a unique name, with no spaces, that Salesforce uses, internally, to refer to the report.

Give as much description as you want. This will show up as gray text, next to your report in the list.

Important: Click the arrow of the bottom line and choose “My Personal Custom Reports” as the folder to save your new report to. Then click the Save button.



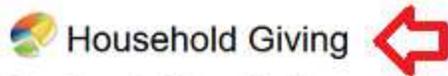
As shown above, the report you are now working with is your new, “Household Giving” report. And this new report will be found in your, “My personal Custom Reports” folder.

(Note that the original, “Organizational Giving” report will remain, unchanged.)

1.1.3 Customize your new Household Giving report

If you are still in the screen from the above procedure (as in the above, left), you are already in the screen to start customizing.

If you start from the list of reports (as in the above right), you can go to the “My Personal Custom Reports” folder and then click on your Household Giving report.



Report Generation Status: Complete

Report Options:

Summarize information by: Show:

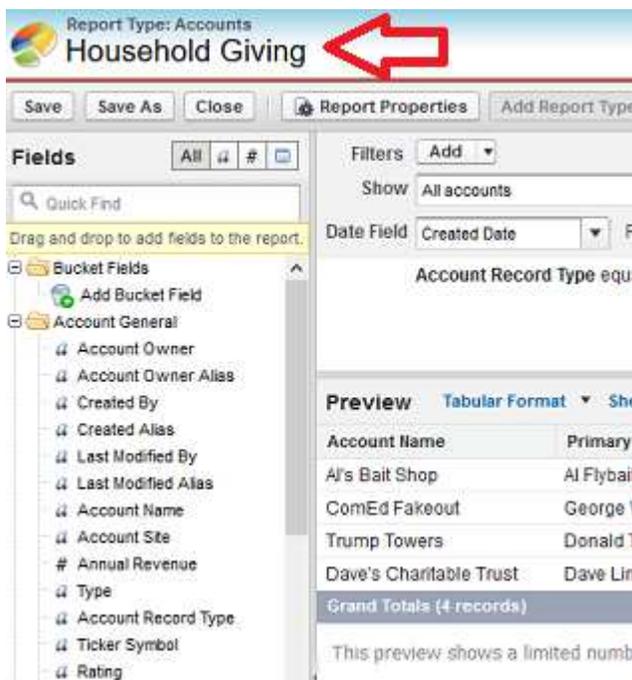
Time Frame: Date Field: Range:
From:

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
Dave's Charitable Trust	Dave Lindstrom	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00	\$5,000.00	\$5,000
Al's Bait	Al Flybait	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$1,000

When you first click on a report, you are in the screen to Run the report (not to customize it). As shown above, notice that there is not left-pane for the Account Object fields. To customize the report, click the “Customize” button.

Now, you are back in the Report Customization screen.



As seen above, note that the Customization screen shows the Object and Fields in the left pane.

1.1.4 Change the Report Filtering to show only Household objects

Asdfsad

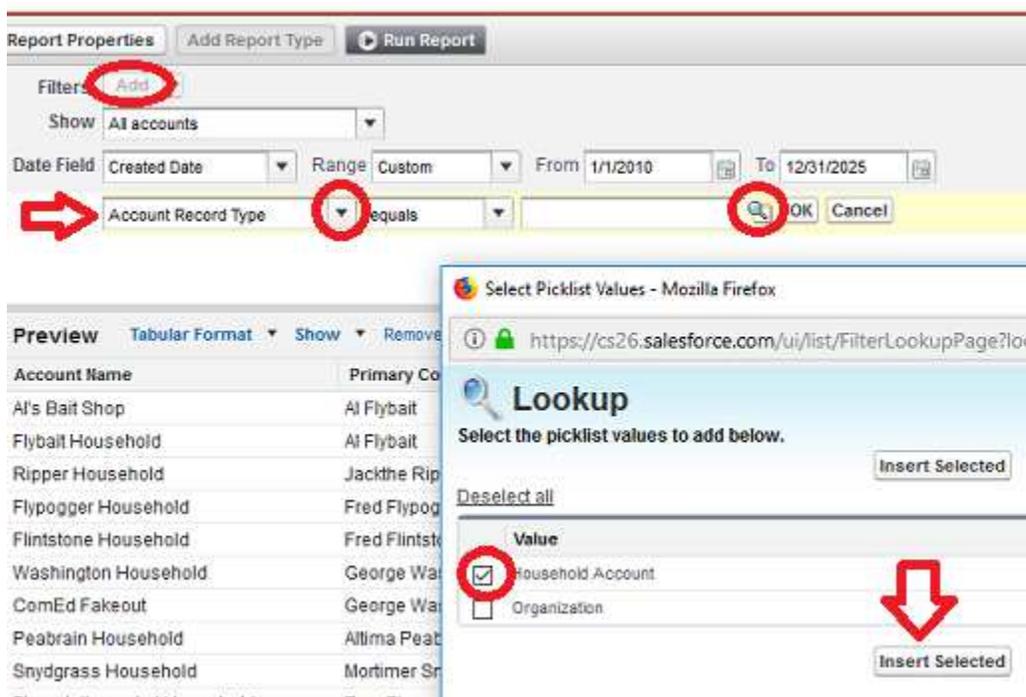


As seen above, the Organization Giving report that we created this report from, filtered on Organization account objects. We want to filter on Household account objects.

Remove the old filter by putting your mouse over the filter text (red arrow). Then click on the blue Remove link.

Notice that the list of records on the right updates and now includes Account records of all types (Organization and Household).

Add a new filter

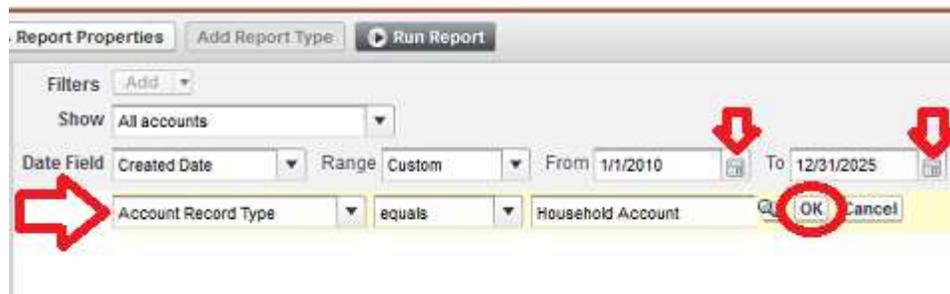


As shown above, click the Filter Add button on the top left to add a new filter.

New fields pop-up. Click on the arrow for the field on the left and select **Account Record Type** from the list of fields (as shown in the red arrow on the left).

Then click on the magnifying glass icon by the field on the right. A Lookup screen pops-up, with the choice of Account Record Types to filter on. Click the box for **Household Account** record type and click the **Insert Selected** button.

1.1.5 Check your filter and report properties



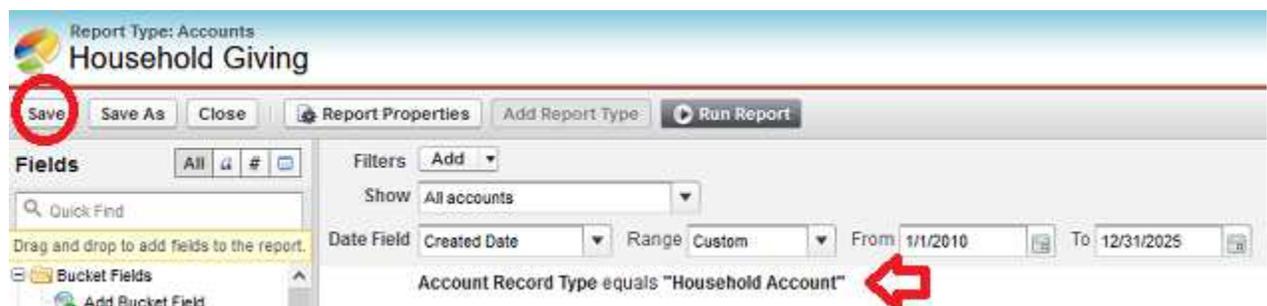
As shown above, your new report filter is in the white area on the bottom of the report properties (red arrow, left). **Check your filter to make sure it is what you want.** As shown, the report will show records whose Account Record Type equals Household Account. (Accounts with Record Type of Organization will not be included.)

Also check your other selection parameters. For most reports, make sure you are showing:

All accounts with a Created Date range from an arbitrarily low date (1/1/2010) to an arbitrarily high date (12/31/2025). (Use the calendar icons if you want to change the dates – red arrows, right).

When everything looks like what you want, click the OK button.

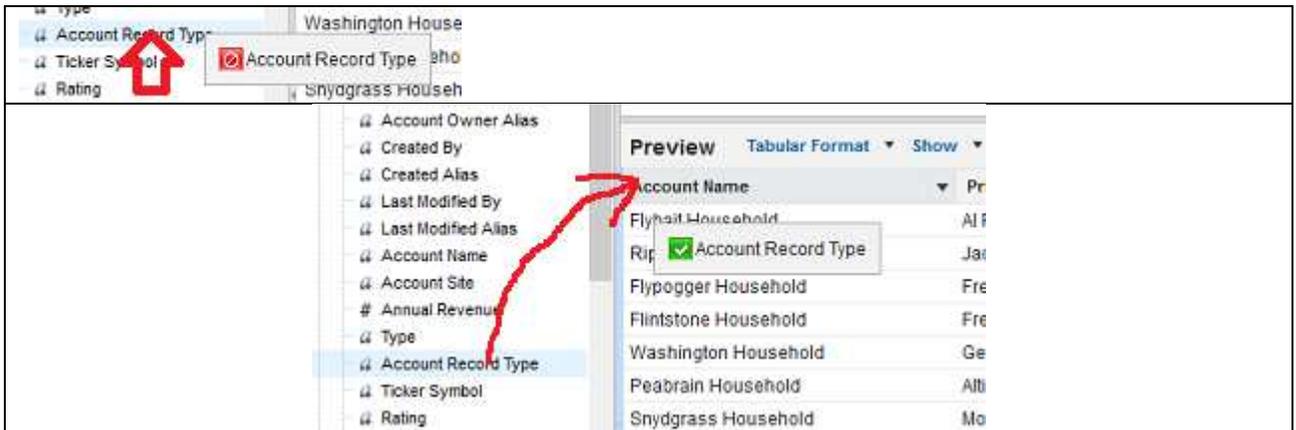
1.1.6 Save your updated report



As shown above, the new filter that you just created shows that the report will include only Households. Make any last checks and/or adjustments. **When you are satisfied, click the Save button.**

1.1.7 Add a column

Just to make sure I am not picking up any Organization objects, I will add the *Account Record Type* to the report.



As shown above, I just find that field in the pane on the left and drag it to the report Column Head bar on the right. While I am dragging the field, the field shows a red-slash icon. When I am at a place on the column-head bar where I can drop it, the icon turns into a green check.



As shown above, now my report has a new column, *Account Record Type*

1.1.8 Change the sorting

Notice that the above report is ordered alphabetically, by Account Name. What if I want to always show the highest giving amount at the top?

Preview Tabular Format Show Remove All Columns



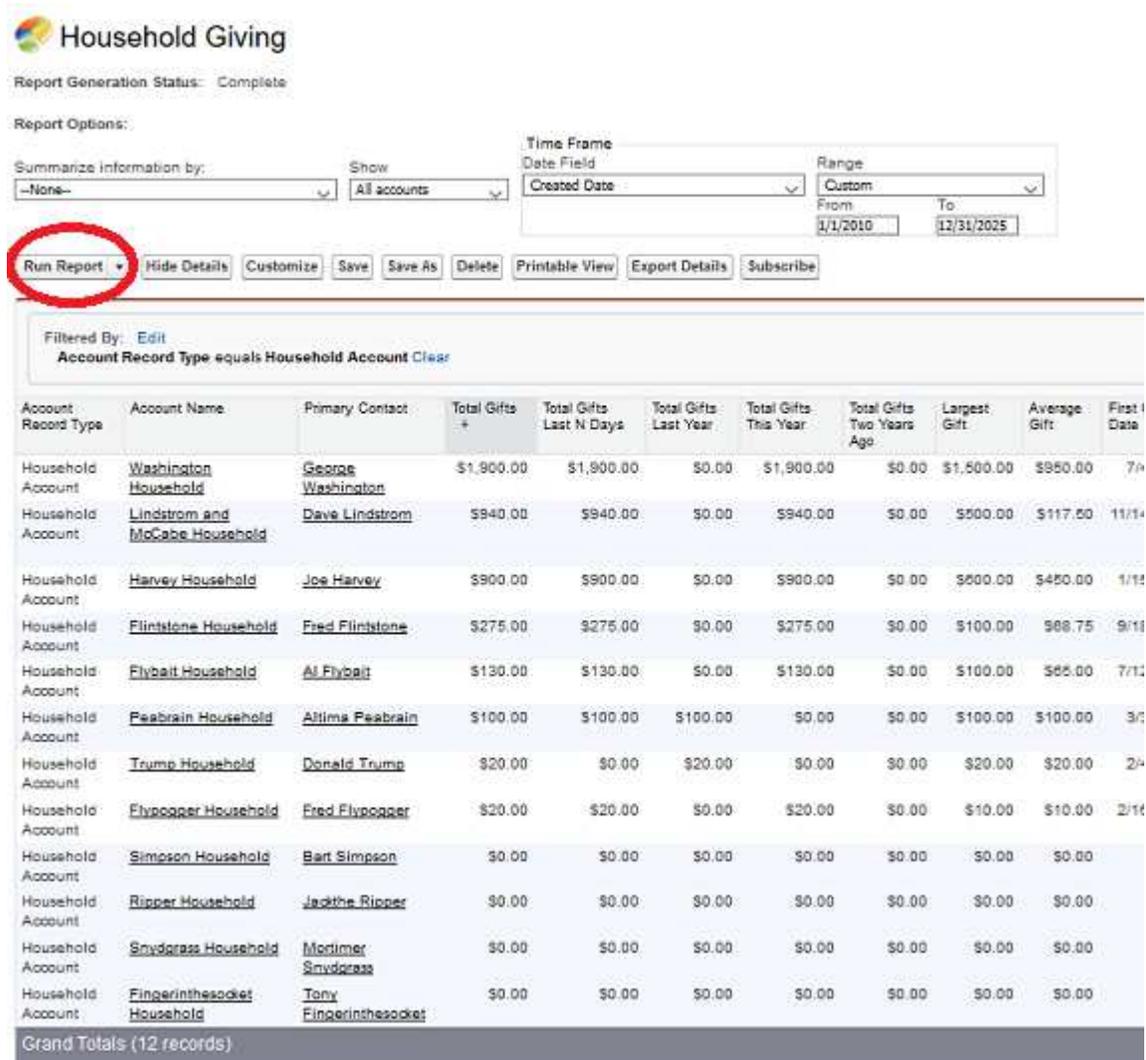
Account Record Type	Account Name	Primary Contact	Total Gifts +
Household Account	Washington Household	George Washington	\$1,900.00
Household Account	Lindstrom and McCabe Household	Dave Lindstrom	\$940.00
Household Account	Harvey Household	Joe Harvey	\$900.00
Household Account	Flintstone Household	Fred Flintstone	\$275.00
Household Account	Flybait Household	Al Flybait	\$130.00
Household Account	Peabrain Household	Altimia Peabrain	\$100.00
Household Account	Flypogger Household	Fred Flypogger	\$20.00
Household Account	Trump Household	Donald Trump	\$20.00
Household Account	Ripper Household	Jackthe Ripper	\$0.00
Household Account	Snydgrass Household	Mortimer Snydgrass	\$0.00
Household Account	Fingerinthesocket Household	Tony Fingerinthesocket	\$0.00
Household Account	Simpson Household	Bart Simpson	\$0.00

I click once on the *Total Gifts* column head name, and it sorts with the lowest amount at the top. I click the column name again, and it sorts with the biggest amounts at the top.

Now I can *Save* the report again, and it will always run with the largest amounts at the top.

1.1.9 Run the report

Remember, what you see is not the report, itself. You need to Run the report.



Household 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 Household Account [Clear](#)

Account Record Type	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 Date
Household Account	Washington Household	George Washington	\$1,900.00	\$1,900.00	\$0.00	\$1,900.00	\$0.00	\$1,500.00	\$950.00	7/11/11
Household Account	Lindstrom and McCabe Household	Dave Lindstrom	\$940.00	\$940.00	\$0.00	\$940.00	\$0.00	\$500.00	\$117.50	11/11/11
Household Account	Harvey Household	Joe Harvey	\$900.00	\$900.00	\$0.00	\$900.00	\$0.00	\$600.00	\$450.00	1/11/11
Household Account	Flintstone Household	Fred Flintstone	\$275.00	\$275.00	\$0.00	\$275.00	\$0.00	\$100.00	\$68.75	9/11/11
Household Account	Flybait Household	Al Flybait	\$130.00	\$130.00	\$0.00	\$130.00	\$0.00	\$100.00	\$65.00	7/11/11
Household Account	Peabrain Household	Altima Peabrain	\$100.00	\$100.00	\$100.00	\$0.00	\$0.00	\$100.00	\$100.00	3/11/11
Household Account	Trump Household	Donald Trump	\$20.00	\$0.00	\$20.00	\$0.00	\$0.00	\$20.00	\$20.00	2/11/11
Household Account	Flypogger Household	Fred Flypogger	\$20.00	\$20.00	\$0.00	\$20.00	\$0.00	\$10.00	\$10.00	2/11/11
Household Account	Simposon Household	Bart Simpson	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Household Account	Ripper Household	Jack the Ripper	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Household Account	Snydgrass Household	Mortimer Snydgrass	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Household Account	Fingerinthesocket Household	Tony Fingerinthesocket	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Grand Totals (12 records)

As shown above, after clicking the **Run Report** button, your report displays, with the records sorted as you had customized (largest **Total Gift** amounts at the top).

1.1.10 Print the Report

You can print your report to either a Web Browser, then to a PDF or printer. This gives you a quick way to Save or Print your report.

Refer to the earlier section in Part 1 of this document, **1.2.5 Print or Export**.

Note that this is a quick and easy way to print a report, but you are limited in formatting or further manipulating the data.

1.1.11 Export your report to a Spreadsheet

In order to more precisely work with the data in the report, you can export the data to a spreadsheet program, like Microsoft Excel.

This is explained in a separate module on the *Basics of Excel*.
