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.

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Folders	ProjectC	Driward Reports
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ProjectOnward Reports	Action	Name †
		Contacts Accounts and Contacts
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🗐 Campaign Monitor for Salesforce (Insta	~	Organization Giving
Household Reports (Installed Package:		Gifts fields include all types of donations, and exclude
IATS Brickwork Reports (Installed Pack	Edit	Art Sales.
MailChimp for Salesforce (installed Paci-		Contractional Accounts
Nonprofit Edition Reports (Installed Paci	Delete	
NPSP Donor Management Dashboard	Export	U Volunteers
NPSP Donor Management Reports	Contract	5

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"



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. <u>Only you</u> 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 Properties Add F	Report Type 🛛 🕞 Run Re	port		
Filters Add ¥				
Show All accounts	•			
Date Field Created Date	Range Custom	▼ From	/1/2010 To 12/31/20	025 🗐
Preview Tabular Form	nat * Show * Remove Primary Contact	All Columns	Total Gifts Last N Days	Total Gifts Last Year Total
				F0.00
Al's Bait Shop	Al Flybait	\$1,000.00	\$1,000.00	50.00
Al's Bait Shop ComEd Fakeout	Al Flybait George Washington	\$1,000.00	\$1,000.00	50.00
Al's Bait Shop ComEd Fakeout Trump Towers	Al Flybait George Washington Donald Trump	\$1,000.00 \$10,000.00 \$0.00	\$0.00	\$0.00 \$0.00 \$0.00
	Filters Add Filte	Filters Add Filters Add Filte	Filters Add Filters Add Filters Add Filters Add Filters Add Filters Add Filters Add Filters Add Filters Add Filters From Filters Date Field Created Date Filters Filt	Filters Add Show At accounts Date Field Created Date V Range Custom From Maccount Record To 12/31/2 Account Record Type equals "Organization"

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).

		Save Report As	Help for this Page	0 ×		
bular Forr	nat * S	Report Name	Household Ching	31		
	Prima	Report mine	Household Giving		ear	Tota
	Al Flyb	Report Unique Name	Household_Giving	1	\$0.00	
	Georg	Report Description	Giving by Household (no Organization		\$0.00	
	Donal		accounts included)		\$0.00	
a Trust	Dave L	Report Folder	My Personal Custom Reports	1	\$0.00	
ecorda)	l.	and a second second	~			
ows a lin	nited nun		1)			
			ne and Run Benert			

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

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.

Peport Type: Accounts Household Giving		Folders	My Personal Custom Report
Save Save As Close Fields All 4 # Quick Find Drag and drop to add fields to the report. Bucket Fields Add Bucket Field Count General Account General	Report Properties Add Report Type Filters Add • Show All accounts Date Field Created Date • Account Record Type equilibrium	Q, Find a folder. All Folders ProjectOnward Reports Unfied Public Reports Unfied Public Reports My Personal Custom Reports My Personal Dashboards Campaign Monitor for Salesforce (Insta Campaign Monitor for Salesforce (Insta	Q. Find reports and dashboards Action Name + Image: Constant Strategy of Constant LYBUNT Image: Contact LYBUNT
Account Owner Account Owner Alias Created By Created Alias Last Modified By Last Modified Alias Account Name Account Ste # Annual Revenue Type Account Record Type Ticker Symbol Reting	Preview Tabular Format S Account Name Primar Al's Bait Shop Al Flyb ComEd Fakeout George Trump Towers Donald Dave's Charitable Trust Dave L Grand Totals (4 records) This preview shows a limited number	Household Reports (Installed Package IATS Brickwork Reports (Installed Pack MailChimp for Salesforce (Installed Pack Nonprofit Edition Reports (Installed Pack NPSP Donor Management Dashboard NPSP Donor Management Reports	Contacts who ha

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 Genera	tion Status: (Complete							
	DON DIALOUT	Saulhiere.							
Report Options	£			1	Time Frame –				
Summarize info	ormation by		Show		Date Field			Rang	je .
-None			All accounts		Created Date 🗸			Custom	
								From	1
		10000						1/1/2	010
	OIME DEBR	s. Customize	Save Save	As Dele	te Printable	View Export D	etails	2008	CLIDE
Filtered By Account	: Edit Record Type e	quals Organiza	tion Clear	As Dele	Printable	View Export D	etails	5005	cnbe
Filtered By Account	Edit Record Type e Primary Contact	quals Organiza	tion Clear Total Gifts Last N Days	Total Gifts Last Year	Total Gifts This Year	Total Gifts Two Years Ago	Larges	t Gift	Averag Gift
Filtered By Account Account Name Dave's Charitable Trust	Edit Record Type e Primary Contact Dave Lindstrom	quals Organiza Total Gifts \$5,000.00	tion Clear Total Gifts Last N Days \$0.00	Total Gifts Last Year S0.00	Total Gifts This Year S0.00	Total Gifts Two Years Ago \$5,000.00	Larges \$5,00	t Gift	Averag Gift \$5,00

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.

Save Save As Close	Report Prop	erties Ad	d Report Type
Fields All 4 # 📼	Filters	Add 🔻	
Q. Quick Find	Show	All accounts	
Drag and drop to add fields to the report.	Date Field	Created Date	▼ F
Add Bucket Field Account General Account Owner Account Owner Alias Control of the second of the		Tobulas Es	ora rype equ
Created By Created Alias	Preview	Tabular Po	irmat • shi
4 Last Modified By	Account Na	me	Primary
A Last Modified Alias	Al's Bait Sh	op	Al Flybai
4 Account Name	ComEd Fai	reout	George
a Account Site	Trump Tow	ers	Donald
# Annual Revenue	Dave's Cha	ritable Trust	Dave Lin
A Type Account Record Type	Grand Total	s (4 records)	

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).

Report Properties Add Report Ty	pe 💽 Run Repo	a l		
Filter				
Show All accounts				
Date Field Created Date 💌	Range Custom	▼ From 1/1/2010	To 12/31/20	25 🔛
Account Record Type	equals		Call OK Ca	ancel
		**		
		Select Picklist Values - Moz	illa Firefox	
Preview Tabular Format * 5	ihow • Remove	🛈 🔒 https://cs26.salesf	orce.com/ui/list/F	ilterLookupPage?lo
Account Name	Primary Co	a)		
Al's Bait Shop	Al Flybait	Lookup		
Flybait Household	Al Flybait	Select the picklist values to a	add below.	
Ripper Household	Jackthe Rip			Insert Selected
Flypogger Household	Fred Flypog	Deselect all		
Flintstone Household	Fred Flintste	Value		
Washington Household	George Wa	Household Account		
ComEd Fakeout	George War	Organization		45
Peabrain Household	Altima Peat	and the second state		V
Snydgrass Household	Mortimer Sr			Insert Selected

Add a new filter

As shown above, click the Filter Add button on the top left to add a new filter. Systems Training - Project Onward - 1Q2018 – Salesforce Reports Part 2 - Page 7 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

	Type: Accounts ehold Giving											
Save Save	As Close	Report Pro	perties	Add Re	port Ty	(pe	🕽 Run Repo	nt				
Fields	All 4 # 🖂	Filters	Add	•								
Q Quick Find		Show	Allacco	ounts		1	•					
Drag and drop to	add fields to the report.	Date Field	Created	Date	*	Range	Custom	•	From 1/1/2010	12	To 12/31/2025	1
Bucket Fiel	ds A	1	Accoun	t Record	lype e	quals "I	lousehold A	ccount	0			

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.

Account Reserver	unt Record Type Bho		
Haung	a Account Owner Alias	Preview Tabular Format * Sho	w
	4 Created Alias 4 Last Modified By 4 Last Modified Alias	Flyhait Household	e Pe All
	Account Name Account Site # Annual Revenue	Flypogger Household	Jai Fre
	4 Type 4 Account Record Type	Washington Household	Ge
	4 Ticker Symbol 4 Rating	Snydgrass Household	Mo

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.

@ Created By	Preview Tabular Fo	mat · Show · Remove All Colu	emna	
4 Created Alias	Account Record Type	Account Name	Primary Contact	Total Gifts
4 Last Modified Allas	Household Account	Flybait Household	Al Flybait	\$130.00
4 Account Name	Household Account	Ripper Household	Jackthe Ripper	\$0.00
4 Account Site	Household Account	Flypogger Household	Fred Flypogger	\$20.00
# Annual Revenue	Household Account	Flintstone Household	Fred Flintstone	\$275.00
Account Record Type	Household Account	Washington Household	George Washington	\$1,900.00
d Ticker Symbol	Household Account	Peabrain Household	Altima Peabrain	\$100.00

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 Fo	rmat • Show • Remove All Columns		л	
Account Record Type	Account Name	Primary Contact	Torr Gifts ↓ \$1,900.00 \$940.00	
Household Account	Washington Household	George Washington		
Household Account	Lindstrom and McCabe Household	Dave Lindstrom		
Household Account	Harvey Household	Joe Harvey	\$900.00 \$275.00	
Household Account	Flintstone Household	Fred Flintstone		
Household Account	Flybait Household	Al Flybait	\$130.00	
Household Account	Peabrain Household	Altima 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.

Report Generation	ation Status Complete									
Report Option	s:			Time Frame						
Summarize Information by: Show				Date Field			Range	-		
-None-		All accounts	×	Created Date		~	From	То	~	
-	10.00						1/1/2010	12/31/2025		
Run Report	Hide Details Custo	mize Save Save As	Delete	Printable View	Export Details	Subscribe	1			
-						87 - 13	-			
Filtered B Account Account Record Type	r Edit Record Type equals Hou Account Name	Primary Contact	ar Total Gifts	Total Gifts Last N Dave	Total Gifts Last Year	Total Gifts This Year	Total Gifts Two Years	Largest Grit	Average Gift	First
The second stype				cast it bays		1002 1020	Ago			
Household Account	Washington Household	George Washington	\$1,900.0	50 \$1,900.00	o so.oo	\$1,900	00 \$0.00	\$1,500.00	\$950.00	7/
Household Account	Lindstrom and McCabe Household	Dave Lindstrom	\$940.0	00 \$940.00	50.00	\$940.	00 \$0.00	\$500.00	\$117.50	11/1
Household Account	Harvey Household	Joe Harvey	\$900.0	50 5900.00	\$0.00	\$900.	00 \$0.00	\$500.00	\$450.00	1/1
Household Account	Elintstone Household	Fred Flintstone	\$275.0	9275.00	o so.oo	\$275.	00 \$0.00	\$100.00	\$68.75	9/1
Household Account	Elybelt Household	Al Flybalt	\$130.0	50 \$130.00	o so.oo	\$130	00 50.00	\$100.00	\$65.00	7/1
Household Account	Peabrain Household	Altima Peabrain	\$100.0	5100.00	s100.00	50	00 \$0.00	\$100.00	\$100.00	3/
Household Account	Trump Household	Donald Trump	\$20.0	0 00	\$20.00	50	00 \$0.00	\$20.00	\$20.00	2
Household Account	Elypopper Household	Fred Flypogger	\$20.0	\$20.00	50.00	\$20.	00 \$0.00	\$10.00	\$10.00	2/1
Household Account	Simpson Household	Bart Simpson	50.0	50.00	\$0.00	\$0.	00 \$0.00	\$0.00	\$0.00	
Household Account	Ripper Household	Jackthe Ripper	\$0.0	50.00	0 <u>\$0.00</u>	\$0	00 \$0.00	\$0.00	\$0.00	
Household Account	Snydgrass Household	Mortimer Snydgrasa	\$0.0	50.00	50.00	S0.	00 \$0.00	\$0.00	\$0.00	
Household	Fingerinthesocket	Tony	\$0.0	50.00	\$0.00	50	00 \$0.00	50.00	\$0.00	

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*.