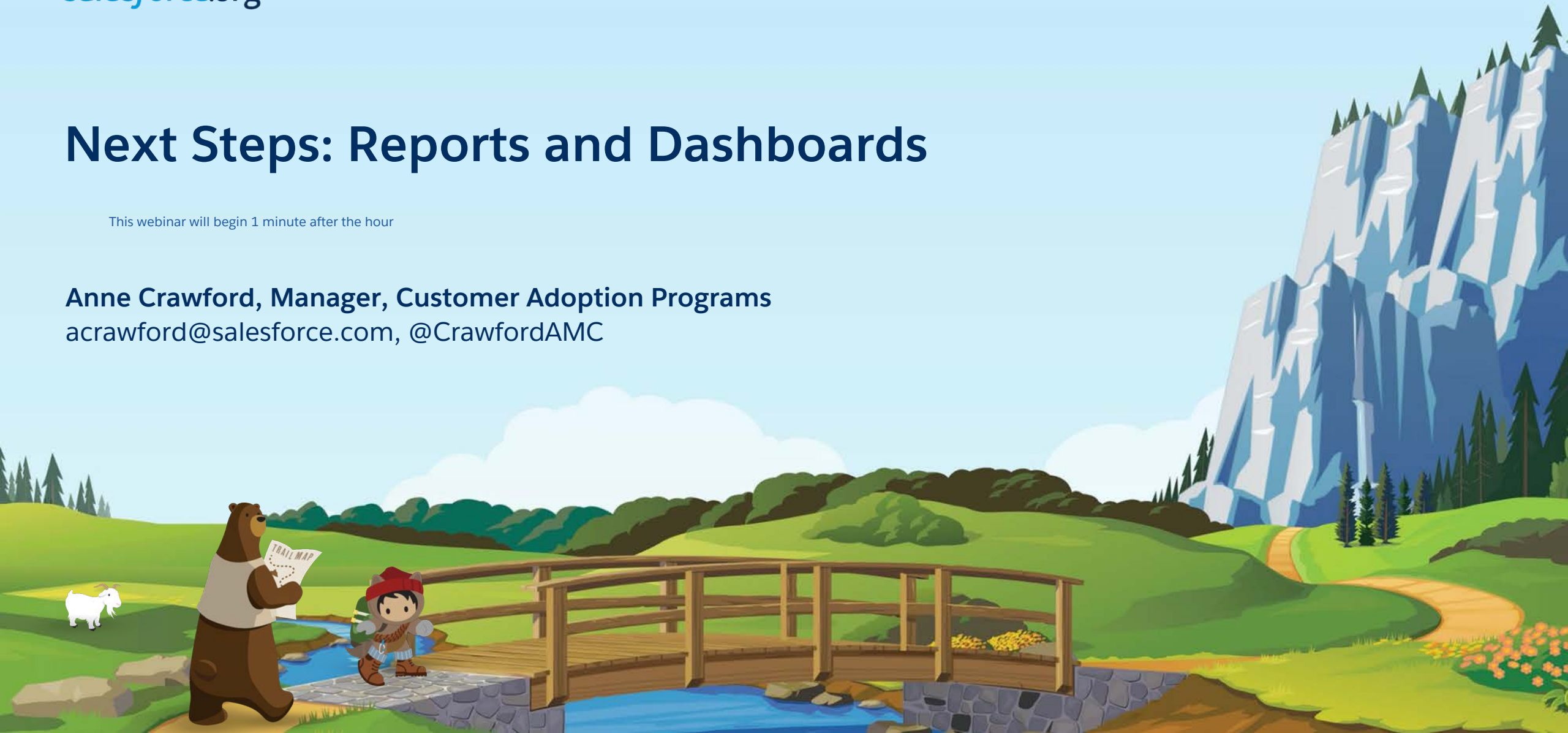
salesforce.org

Next Steps: Reports and Dashboards

This webinar will begin 1 minute after the hour

Anne Crawford, Manager, Customer Adoption Programs
acrawford@salesforce.com, @CrawfordAMC



Introductions

Jessie Rymph

Success Content Specialist

jrymph@salesforce.com

Anne Crawford

Manager, Customer Adoption Programs

acrawford@salesforce.com

Forward-Looking Statement

Statement under the Private Securities Litigation Reform Act of 1995

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.

Logistics

Questions, Answers, and Staying in Touch

- The recording and slides will be emailed and posted
- Ask questions using the Q&A widget
- Continue the discussion in the Reports & Dashboards group in the Power of Us Hub
- Connect with user groups in your area to share best practices and innovations
- Trailhead and the Trailmix

The Power of Us Hub

Quick Poll

What's your Salesforce reports confidence level?

Three Ways to Get a Report in NPSP

Customize, Build, or Create

NPSP Fundraising Reports and Dashboards

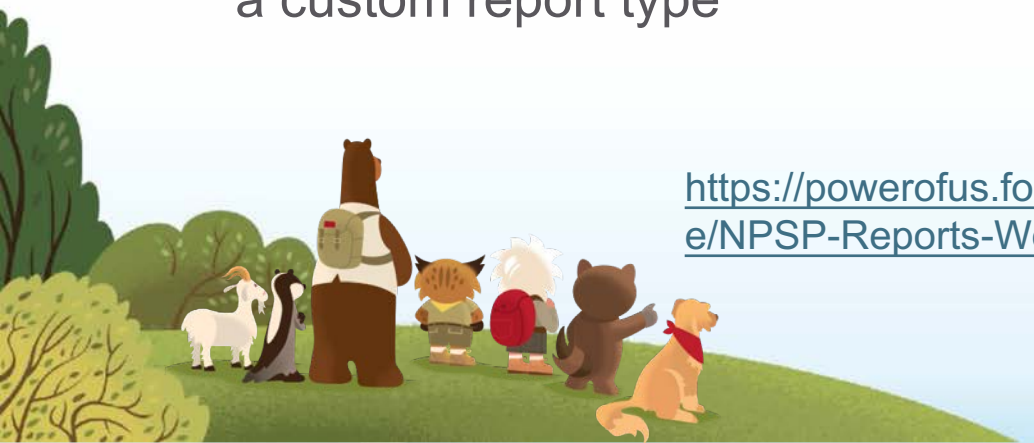
Use an NPSP report as a starting point

NPSP includes 87 sample fundraising and constituent reports and 4 dashboards that you can make your own

Customize NPSP Reports

Use the 36-page NPSP Reports Workbook as a guide

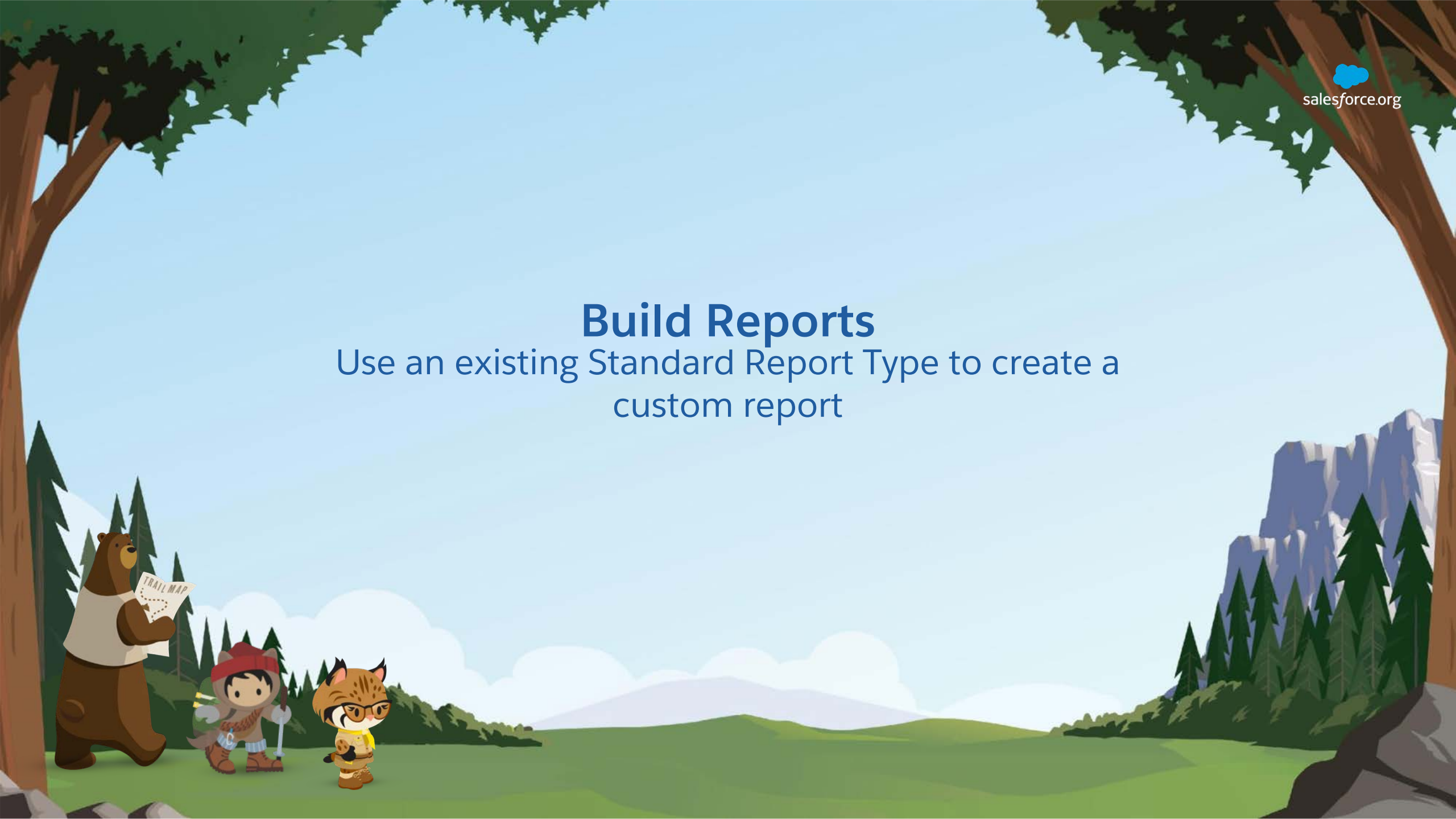
- Indexes all 87 reports and dashboards
- Provides step-by-step tutorials for customizing 4 reports
- Provides a step-by-step tutorial for creating a custom report type



https://powerofus.force.com/s/article/NPSP-Reports-Workbook

Build Reports

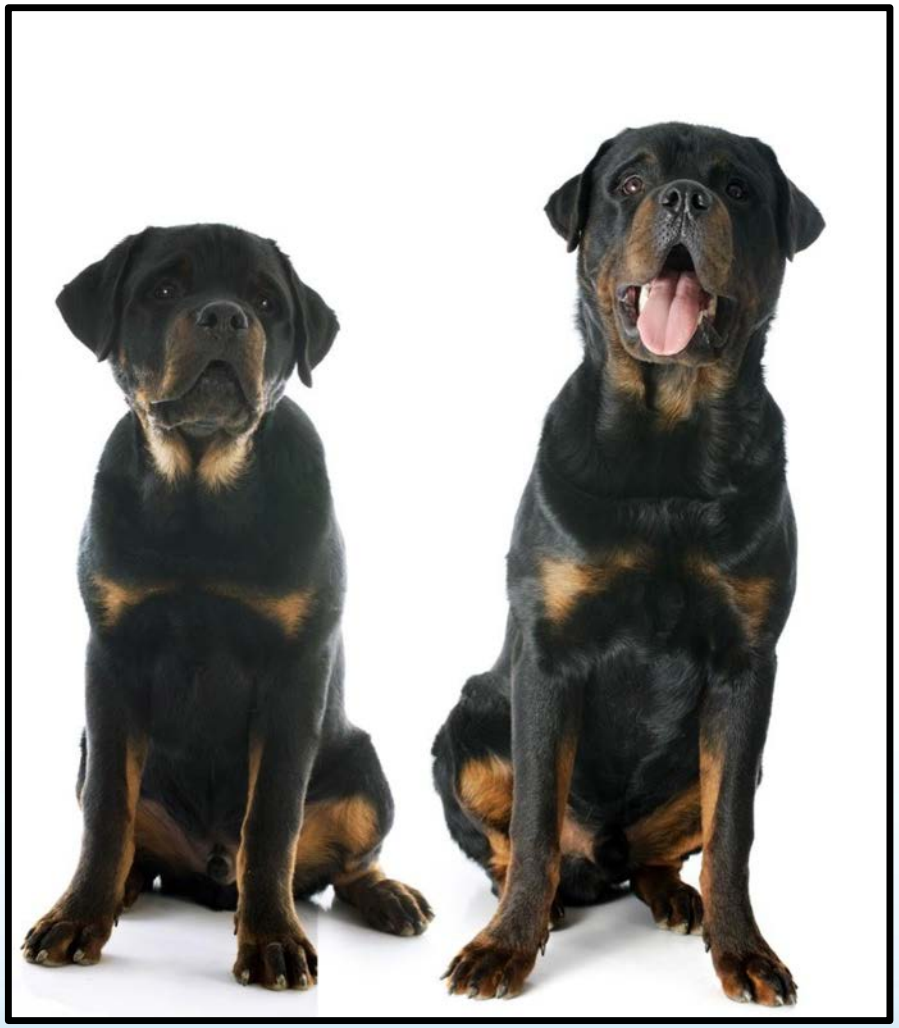
Use an existing Standard Report Type to create a custom report



Begin With the End In Mind

What questions are you trying to answer?

- How are our campaigns doing overall?
- Do we any campaigns without campaign members?
- Which contacts are in my campaigns?
- How can I reach my campaign members at work?



A Report Type is a template which makes reporting easier.

The report type determines which objects, fields, and records are available for use when creating a report.

What is a Report Type?

The Report-Building Plan

salesforce.org

1. **Zero in on Relevant Data**
   Report Types, Display Columns, Filters

2. **Format/Organize into Groups for Calculations**
   Group Rows, Group Columns

3. **Calculate Metrics Per Group**
   Count, Sum, Avg., Min, Max, Custom Summary Formulas

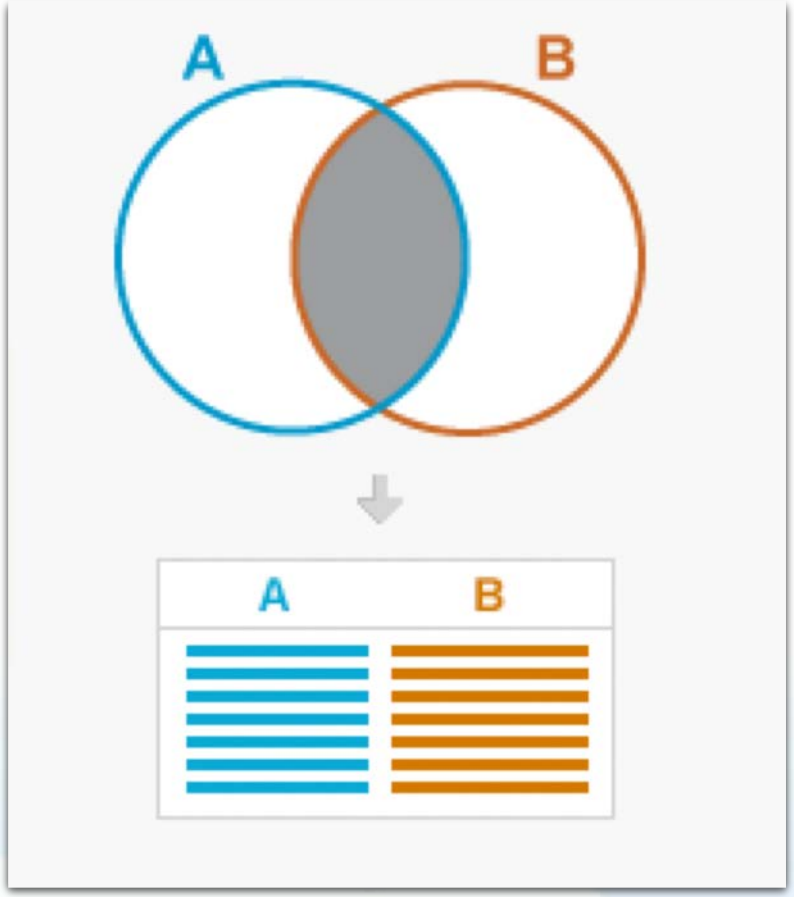
4. **Add Chart(s) for Visualization**
   Add a Table, Gauge, Donut, Bar, Stacked Bar to Dashboard

What is a Standard Report Type?

- Shows records from one object - **A**
  - **Opportunities**
  - **Accounts**

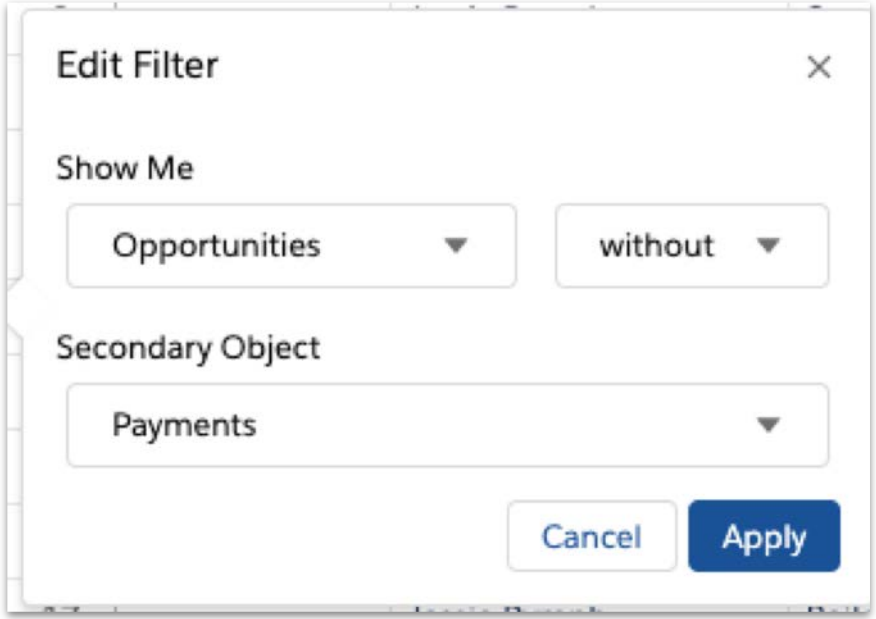
- Shows only records **with both A & B**
  - Accounts with Contacts
  - Opportunities with Payments

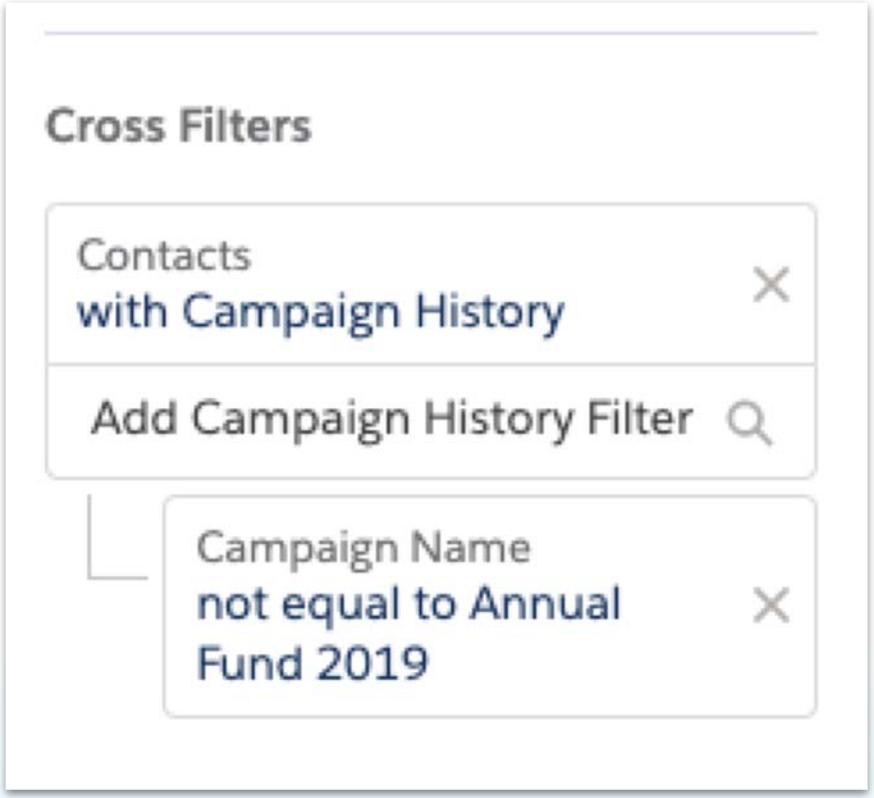
with



What About Cross Filters?

Use cross filters to include or exclude records based on related objects and their fields.





You can create up to five subfilters for each cross filter.

Key Standard Report Types for Nonprofits

Accounts & Contacts

Opportunities

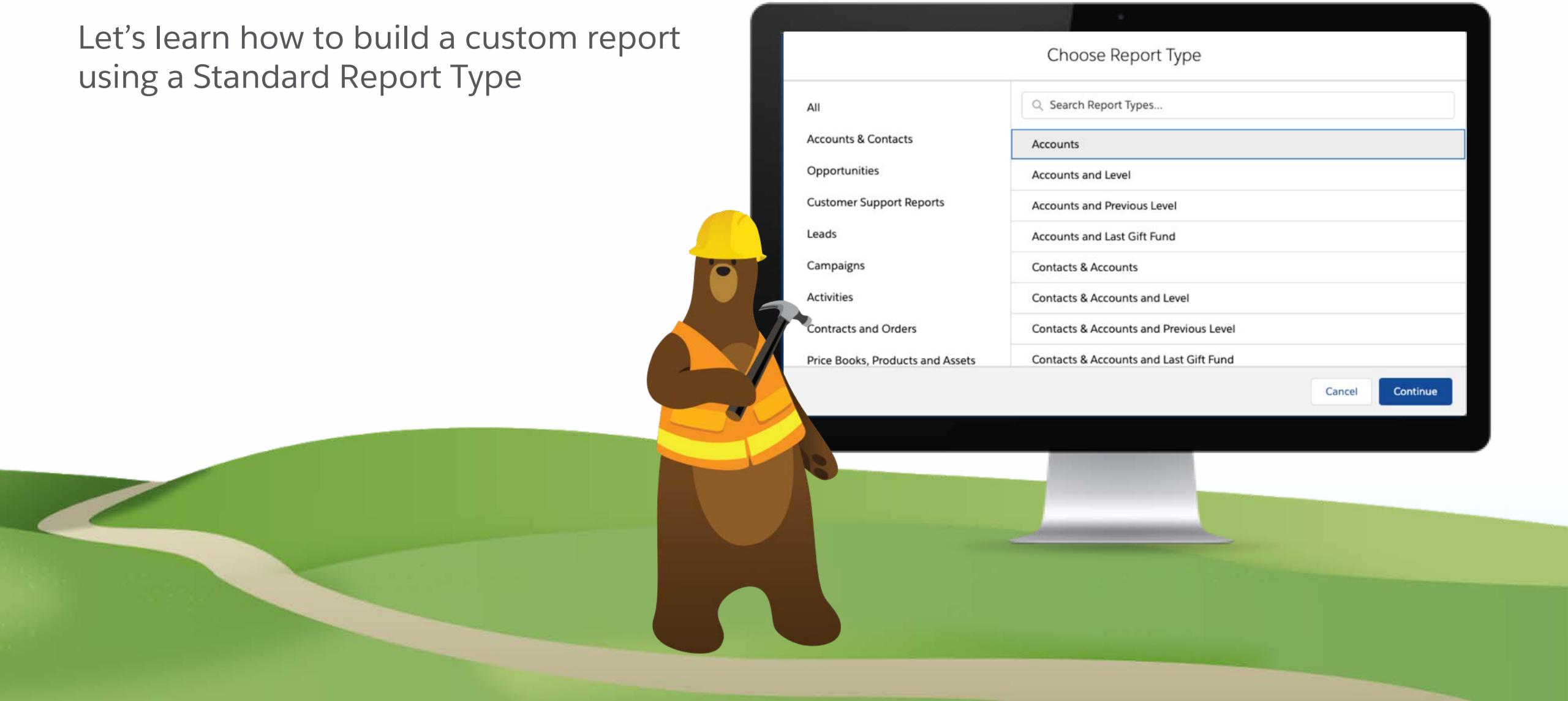
Activities

Leads

Campaigns

It’s Demo Time!

Let’s learn how to build a custom report using a Standard Report Type



Quick recap: standard report types

- All of the fields and records from a single object (i.e. Campaign)
  - Use cross-filters to include or exclude records based on related records (i.e. Campaigns without Campaign Members or Contacts with Campaign History

- A subset of fields and records from two or more objects (i.e. Campaigns AND Contacts)

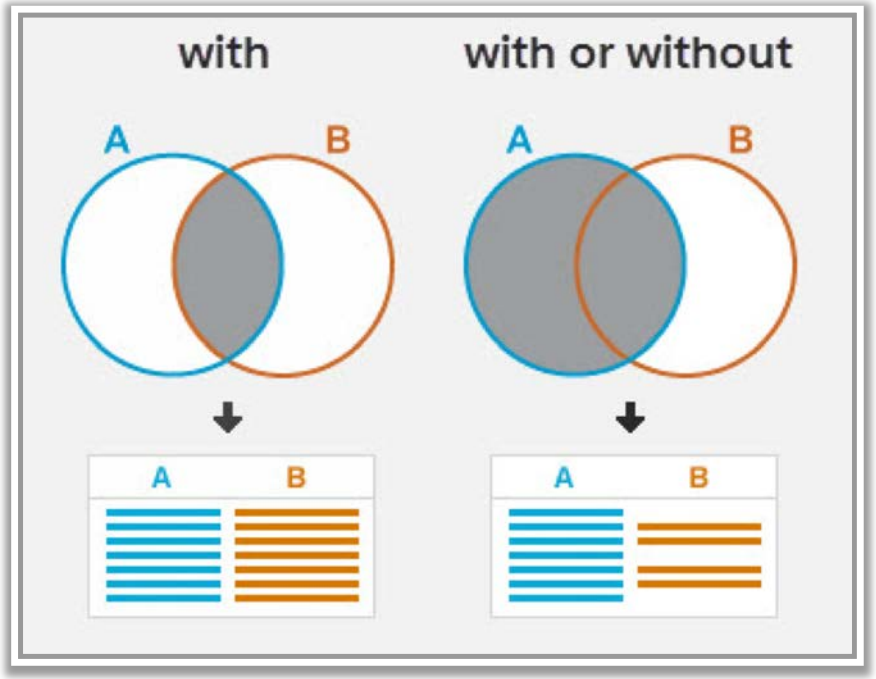
salesforce.org

Extend Reports

Create a Custom Report Type

Build Your Own Custom Report Types

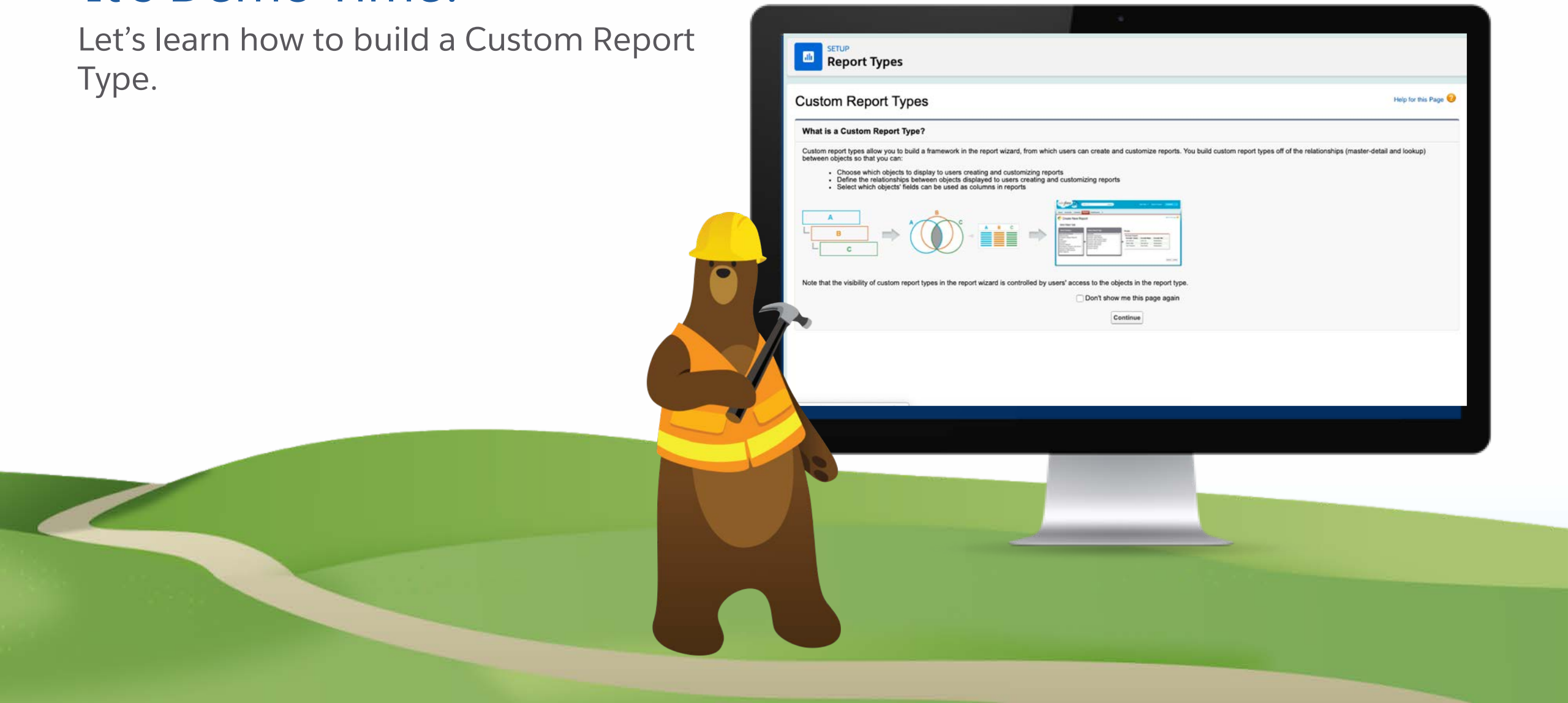
Can't find what you're looking for in Standard Report Types? Build your own.



You can have up to four related objects, and each can have the "with" or "with or without" distinction.

It’s Demo Time!

Let’s learn how to build a Custom Report Type.

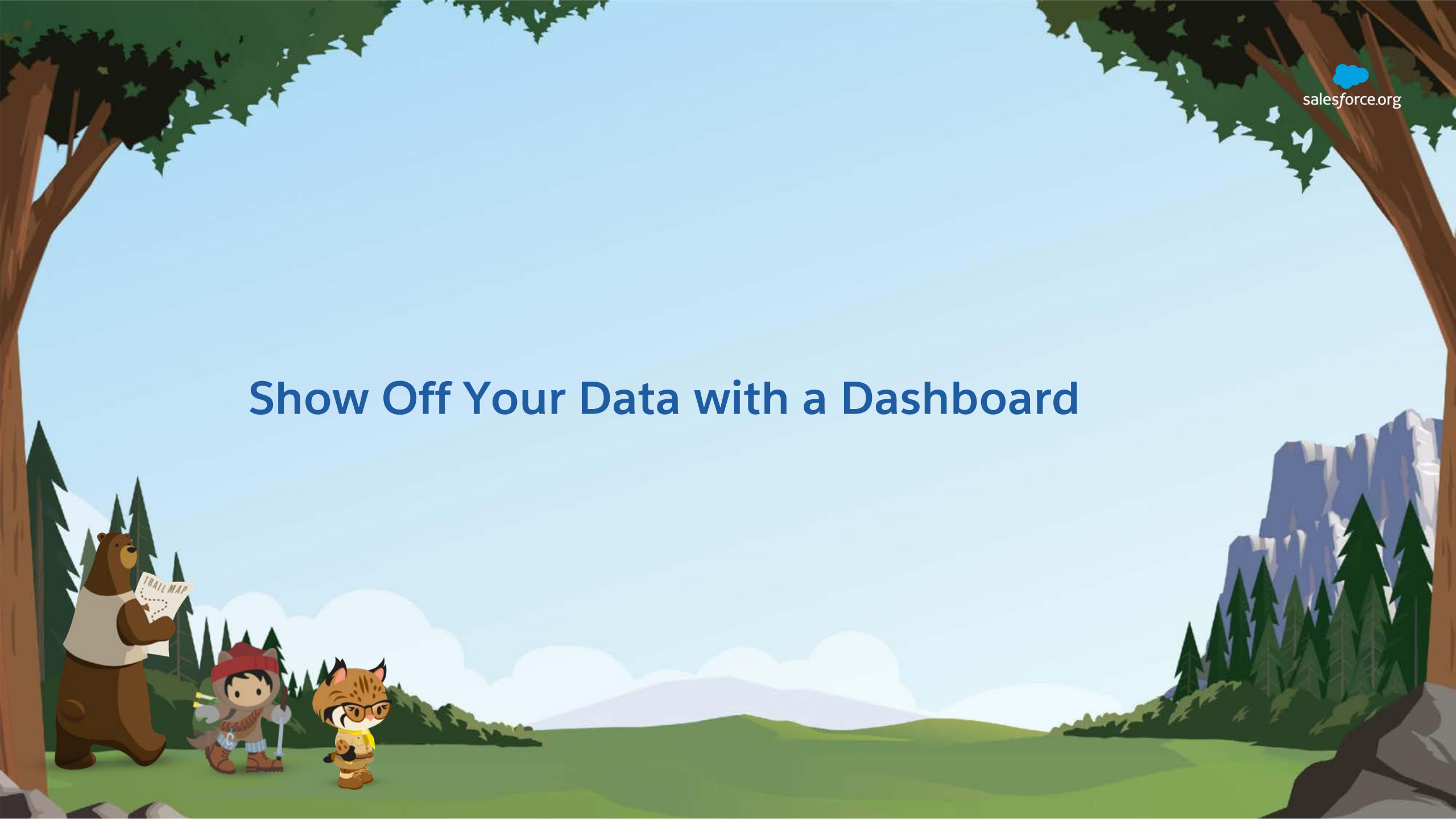


Quick recap of custom report types

- All or some of the the fields and records from two or more objects (i.e.. Opportunities with or without Payments)

- Fields from a related record via lookup (i.e. fields from the Primary Affiliation's account record.)

Show Off Your Data with a Dashboard



It’s Demo Time!

Let’s Learn How to Highlight Our Reports in a Dashboard

Quick recap of dashboards

- Visualize report data in a meaningful collection
- Embed dashboard components in Home Pages and Lightning App pages for greater visibility
- Dashboard subscriptions are helpful for EDs and other executives who may not log into Salesforce regularly otherwise

Three Things You Can Do Today…

Start the Trailmix
https://sfdc.co/EngagementTrailmix

Go to the Power of Us Hub

Visit the AppExchange

Concluding thoughts

- Make sure you understand what information you're trying to get before you start
- Great thing about reports and dashboards is that you can't touch your underlying data
- Use your "Private" report folder for drafts and to play around with
- Ask the "Reports and Dashboards" group in the Hub


thank you