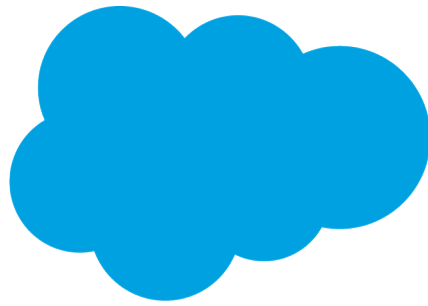




Nonprofit Success Pack Reports Workbook



salesforce.org

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PART 1: THE BASICS

Nonprofit Salesforce Admins and Development personnel are being asked to provide more and more data about their organizations, but seem to have less and less time to prepare reports. Nonprofit Success Pack harnesses the power of Salesforce reports and dashboards to deliver data to you—right out of the box.

In the extensive list of NPSP reports, you'll find reports that track Donors and giving, Grants, Memberships, Campaign ROI, and more. You can use these reports just as they are, or customize them to meet your specific needs. Of course if you can't find what you're looking for, you can always create new reports using the Report Builder, but we recommend customizing the out-of-box reports before you go that route...

And with great reports, come great dashboards! We provide four NPSP dashboards out of the box. These dashboards pull data from dedicated NPSP Dashboard Reports so that you can view trends and data all in one place. Use the dashboards to monitor giving trends, forecast based on open Opportunities, analyze Campaign ROI stats, and more!

If you've been using NPSP for a while, you've probably used the older reports in the NPSP 3.0 report folders. We strongly recommend that you take advantage of the shiny new reports available in NPSP version 3.90 (February 2017). Why, you may ask? Because a team of nonprofit experts from our community, led by Kristina Winters, spent long hours thinking through nonprofit scenarios and identifying the most common reporting use cases. Kristina and the community members then collated them into new reports and dashboards. All in all, we offer 67 new reports and 4 new dashboards.

This workbook wouldn't have been possible without the expert leadership and vision of Kristina Winters, and the great work of a group of Nonprofit community members at two NPSP Sprints (San Francisco and Boston!).

- Justin Barss
- Peter Bender
- Sonny Cloward
- Kayleigh Collins
- Sarah Gill
- Dale Gish
- Theresa Hall
- Ted Hazard
- Adam Kramer
- Jon LaRosa
- Kestryl Lowery
- Jodi Nemser-Abrahams
- Melissa May
- Caitlyn Monaghan
- Mary Pustejovsky
- Ryan Shanahan
- Judi Sohn
- Justin Thich
- Robert Weller

Prerequisites

Before you get started customizing NPSP reports, we highly recommend that you complete these Trails (if you haven't already).

- [Lightning Experience Reports & Dashboards](#) (Module)
- [Manage Fundraising for Nonprofits](#) (Trail)

While the following articles aren't required reading, they may help you along the way. Note that these articles will teach you about Salesforce reporting in general; they aren't specific to nonprofit reports.

- [Learn About Reports](#)
- [Customizing Reports](#)
- [Organize Reports](#)

Nonprofit Success Pack Reports

Now that we've piqued your interest, let us introduce you to the new reports and dashboards. The sections below provide a complete list of the reports and dashboards available with NPSP.

These reports come with new Trials and installations of NPSP starting at version 3.90 (February 2017). If you started a Trial or installed NPSP before this version and date, you can [install the reports](#).

NPSP Constituent Reports

Report Title	Description
All Contacts	All Contacts in your organization.
All Organizations	Accounts that are not One-to-One, Individual Bucket, or Household Accounts.
All Relationships	All Relationships in your org, with only one record from a Reciprocal Relationship.
Current Members (Contacts)	Current members grouped by Membership End Month.
Engagement Plan Tasks	Open tasks and their assigned users that are related to Engagement Plans.
Lapsed Members (Contacts)	Contacts whose memberships have lapsed, grouped by Membership End Date.
Memberships Over Time	New memberships over the lifetime of your org, grouped by Membership Join Date.
New Members	Members who joined in the last 60 days.
New Renewals	Members who have renewed in the last 60 days.

NPSP Fundraising Reports

Report Title	Description
10% Increase Projection	Provides 10% increase projection figures over Last Gift and Last Year Total Gifts.
Account LYBUNT	Accounts that donated last year but unfortunately not this year (LYBUNT).
Account SYBUNT	Accounts that donated some year, but unfortunately not this year (SYBUNT).
Accounts by Best Gift Year	All Accounts grouped by their highest giving year.
Campaign ROI Analysis	Provides return on investment figures for Campaigns with Actual Cost.
Closed/Won Opps by Household	All Closed/Won Opportunities grouped by giving Household Account.
Closed/Won Opps by Type and Fiscal Year	Matrix report of Closed/Won Opportunities by Record Type and Fiscal Year.
Closed/Won Opps by Type and Payment	Matrix report of Closed/Won Opportunities by Record Type and Payment information.
Closed/Won Opps by Type, GAU, and FY	Matrix report of Closed/Won Opportunities by Record Type, GAU Allocation, and Fiscal Year.
Contact LYBUNT	Contacts who donated last year, but unfortunately not this year (LYBUNT).
Contact SYBUNT	Contacts who donated some year, but unfortunately not this year (SYBUNT).
Contacts by Best Gift Year	All Contacts grouped by their highest giving year.
Contacts with Giving Totals	Provides summary calculations for Total Gifts, Best Gift Year, Largest Gifts, and more.
Contacts with Soft Credits	Provides summary calculations for Soft Credit Totals, Soft Credit This Year, Soft Credit Last Year, and Two Years Ago.
Donation % Change This Year vs Last Year	Provides donation percentage change calculation between this year and the previous year, grouped by Account.
Expected Opportunities	Comprehensive list of Opportunities, grouped by Account Record Type, Opportunity Record Type, and Stage.
Expected Overdue Payments	Comprehensive list of overdue Payments.
Expected Payments	Comprehensive list of unpaid Payments, grouped by Payment Scheduled Date.
GAU Allocations and Payments	Joined report (Classic Only) that provides GAU Allocation and Payment information in a single view, grouped by Opportunity.

Report Title	Description
General Accounting Units	Provides various summary calculation figures for individual General Accounting Units. Click Show Details to see a breakdown of Allocations by Opportunity.
Grants This Year	A list of all Grant Opportunities this year.
Households with Giving Totals	Provides summary calculations for Total Gifts, Best Gift Year, Largest Gifts, and more.
Lifetime Account by Level	Provides a breakdown of Total Gifts for all Accounts, grouped by Level.
Lifetime Account Gift Ranges	Provides a breakdown of Total Gifts for all Accounts, grouped by gift range bucket.
Month by Month Donation Comparison	Provides multi-year donation calculation figures, demonstrating cumulative trends for revenue grouped by calendar month over time.
Open Opportunities	A list of open Opportunities, grouped by Stage.
Opportunities by Campaign Source	A list of all Opportunities, grouped by Campaign and Stage.
Opportunities by GAU Allocation	A list of Opportunities, grouped by General Accounting Unit and Fiscal Year. Excludes lost Opportunities.
Opportunities with Payments	Payments grouped by Opportunities with details.
Opportunities with Unclaimed Matching	Opportunities eligible for matching, where the donor's Primary Affiliation matches gifts, but matching fields have not been set on the Opportunity.
Paid Recurring Donations	List of paid Recurring Donation Opportunities, grouped by Account Record Type.
Prior Year Giving with Mailing Address	List of Total Gift amounts with Household address information.
Top 25 Account Donors Lifetime	List of 25 top Account donors, based on Total Gifts.
Top 25 Opportunities Lifetime	List of top 25 Opportunity donations, based on individual Opportunity Amount.
Tribute Opportunities	A list of donations given in honor or in memoriam, grouped by Tribute Type.


NPSP Dashboards

Dashboard Title	Description
Development Analysis	<p>Compare giving this year to the previous three years and get a quick overview of your recent and top donors. Includes charts showing:</p> <ul style="list-style-type: none"> • Giving by Account Record Type this Year • Giving by Opportunity Record Type this Year • Giving by GAU this Year • Giving by Account Record Type Last 3 Years • Giving by Opportunity Record Type Last 3 Years • Giving by GAU Last 3 Years • 25 Most Recent Gifts this Year • Top 25 Household Gifts this Year • Top 25 Organization Gifts this Year
Development Forecasting	<p>Review giving in your pipeline, and find and cultivate new potential donors. Includes charts showing:</p> <ul style="list-style-type: none"> • Open Opportunities by Stage • Open Opportunities by Record Type • Open Opportunities by Campaign • Overdue Payments • Expected Payments Next 90 Days • Top Delinquent Accounts • Pipeline by Month and Stage • Top 25 LYBUNT Households • Top 25 LYBUNT Organizations • Top 25 SYBUNT Households • Top 25 SYBUNT Organizations
Giving Range Analysis	<p>Break your donors into groups and review each individually for patterns year over year. Includes charts showing:</p> <ul style="list-style-type: none"> • Amount by Range 2yrs Ago • Amount by Range Last Year • Amount by Range This Year • Donors by Range 2yrs Ago • Donors by Range Last Year • Donors by Range This Year


Dashboard Title	Description
NPSP Campaign ROI Analysis	Compare your fundraising campaigns and analyze their success. Includes charts showing: <ul style="list-style-type: none"> • Total Donations by Campaign • Total Donations vs Actual Cost • Return on Investment (ROI) • Cost Per Donor (CPD) • Cost Per Dollar Raised • Return on Initial Investment (ROI) • Net Per Donor Average Donation • Number of Donations

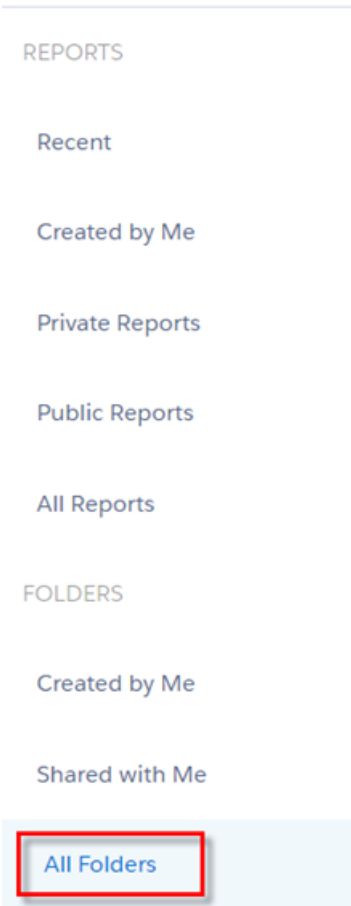
Where to Find the NPSP Reports and Dashboards

Now that you have background information on what reports we offer, you need to know where to find them! We conveniently grouped our reports into easy-to-locate folders.

 **Note:** The screenshots and accompanying steps in this document might look different than what you see in your Salesforce org. That's because, as of November 2016, Nonprofit Success Pack defaults to the Lightning Experience user interface for new trials. To find out more about Lightning Experience, check out [this doc](#).

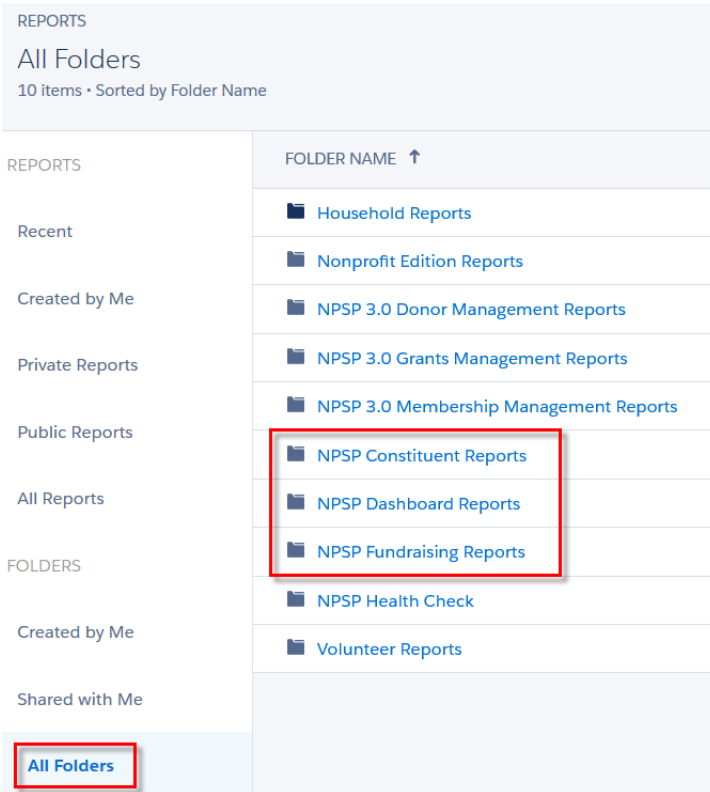
To find the reports folders:

1. Click **Reports** in the navigation bar. If you don't see reports, you may need to click the App Launcher () , then scroll down to All Items.
2. In the left navigation, click **All Folders**.



The NPSP reports are located in three conveniently named folders.

- NPSP Constituent Reports
- NPSP Fundraising Reports
- NPSP Dashboard Reports—Reserved for use as source material for the NPSP dashboards. Editing them will cause issues with the NPSP dashboards.



Important: We recommend that you [change the folder sharing access](#) for all non-Administrators to `Viewer`, so that these users are unable to edit the reports directly. That way you're preserving the out-of-box reports, but users will still be able to easily customize them and save as copies.

Note: You may notice the other NPSP report folders (NPSP 3.0 Donor Management Reports, NPSP 3.0 Grants Management Reports, NPSP 3.0 Membership Management Reports). These are the old NPSP reports that we're replacing. For more information on hiding these reports, see [What To Do With the Old Reports](#).

3. Click a report name to view it.
4. To view the NPSP dashboards, click the App Launcher (🗄️), then scroll down to All Items.
5. Click **Dashboards**.
6. Click **All Folders**, then click **NPSP Dashboards**.

DASHBOARDS

All Folders New Dashboard

6 items • Sorted by Folder Name

DASHBOARDS	FOLDER NAME ↑	CREATED BY	LAST MODIFIED BY	CREATED ON
Recent	Company Dashboards	Admin User	Admin User	1/20/2017 10:03 AM
Created by Me	NPSP 3.0 Donor Management Dashb	Admin User	Admin User	1/20/2017 10:03 AM
Private Dashboards	NPSP 3.0 Grants Management Dashb	Admin User	Admin User	1/20/2017 10:03 AM
All Dashboards	NPSP 3.0 Membership Management	Admin User	Admin User	1/20/2017 10:03 AM
	NPSP Dashboards	Admin User	Admin User	1/20/2017 10:03 AM
	Volunteer Dashboards	Admin User	Admin User	1/20/2017 10:03 AM

FOLDERS

Created by Me

Shared with Me

All Folders

7. Click a dashboard name to view it. For example, clicking on Development Forecasting brings up this handy dashboard.

DASHBOARD Development Forecasting Refresh Edit

As of Jan 3, 2017 9:08 AM - Viewing as Team Reports

Open Opportunities By Stage

13k

Stage | ● Prospecting ● Pledged ● LOI Submitted

[View Report](#)

Open Opportunities by Record Type

13k

Opportunity Record Type | ● Donation ● Grant

[View Report](#)

Open Opportunities by Campaign

13k

Primary Campaign Source | ● Data Import Sample 7... ● Test Campaign KW

[View Report](#)

Overdue Payments

Sum of Payment Amount

Scheduled Date

[View Report](#)

Expected Payments Next 90 Days

Sum of Payment Amount

Scheduled Date

[View Report](#)

Top Delinquent Accounts

ACCOUNT NAME	SUM OF PAYMENT AMOUNT
Jones and Friends	\$10,000
Angelo and Joseph Pittman Household	\$475
Alan Floyd and Joy Salyer Household	\$255
Day Household	\$200
Cory Erdman Household	\$180
Carl McDougall Household	\$100

[View Report](#)

PART 2: TUTORIALS

Salesforce reports are highly customizable using the Report Builder, and the NPSP reports are no exception.

While we provide many varied reports out of the box, we know that they may not exactly meet your needs and you may need to customize them to be an exact fit for your org. In the following sections, we'll provide you with detailed steps for how to customize some of the NPSP reports. Keep in mind that the tutorials aren't so much about the specific reports we're showing you how to customize—they're more about learning how to customize specific aspects of different kinds of reports. Each tutorial has a key learning objective that we'll walk through. There are four tutorials, and they start off with an easy customization and get harder as you go along.

Important: When customizing reports, we recommend that you Save As with a new name so as not to overwrite the original report. We also recommend that you create a new report folder just for these reports, so that it's easy to tell the difference between the NPSP reports and your customized reports. Keep in mind that if you save them in your Personal reports folder, no one else in your org will see them. For the tutorials below, we'll be saving the customized reports in a folder we created called "Customized NPSP Reports." Your report folder name may differ.

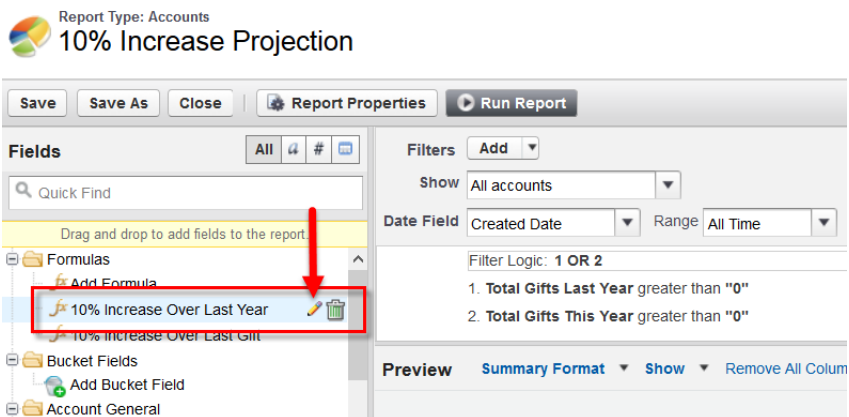
TUTORIAL: Customize the 10% Projection Report

Key Learning Objective: Edit summary formula fields

The 10% Increase Projection report is a very useful fundraising tool. It includes a formula that calculates percentage-based increases based on report data. Reports can include formulas like this, that act like custom fields, but that only look at summary data in the report. For more information on summary formulas, see [Work with Formulas in Reports](#) in the Salesforce Help & Training.

Perhaps you want to project a 15% or 20% increase instead of 10%. This is a quick and easy customization that is achieved by changing the formula associated with the report. Let's walk through it.

1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Fundraising Reports**.
3. Click **10% Increase Projection**.
4. Click **Edit**.
5. In the left pane, hover over the 10% Increase Over Last Year formula and click the pencil icon.



6. In the formula field, change the 1.10 to 1.15 (15 % increase) or 1.2 (20% increase) or whatever percentage you'd like to use. Also, change the Column Name and Description to match your new percentage.

Custom Summary Formula
[Help for this Page](#)

Column Name:

Description:

Format:
Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels

Grand summary only

Grouping 1: Account Name

Formula

[Summary Fields](#) [Operators](#)

Account.npo02__OppAmountLastYear_c:SUM * 1.15

Functions [Tips](#)

All

ABS(number)

Returns the absolute value of a number, a number without its sign

[Help on this function](#)

7. Click **OK**.
8. Repeat these steps for the 10% Increase Over Last Gift formula.

Custom Summary Formula [Help for this Page](#) ? x

Column Name: 15% Increase Over Las

Description:

Format: Currency Decimal Places: 2

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels
 Grand summary only
 Grouping 1: Account Name

Formula **Functions** **Tips**

Summary Fields Operators Check Syntax All ABS

Account.npo02_LastOppAmount_c:SUM * 1.15

ABS(number)
Returns the absolute value of a number, a number without its sign

< Insert [Help on this function](#)

OK Cancel

9. Click **Save As**.

10. Give the report a unique name, such as 15% Increase Projection, and select a Report Folder. As mentioned earlier, we recommend creating a new folder just for your customized NPSP reports.

Save Report As [Help for this Page](#) ? x

Report Name: 15% Increase Projection

Report Unique Name: X15_Increase_Projection i

Report Description:

Report Folder: Customized NPSP Reports

Save Save and Run Report Cancel

11. Click **Save** or **Save and Run Report**.

And there it is. Your report now shows a 15% projection over last year's total gifts (1) and a 15% projection over last gift amount (2), organized by Account. And it was so quick, you could easily create another version of this report with a 20% projection!

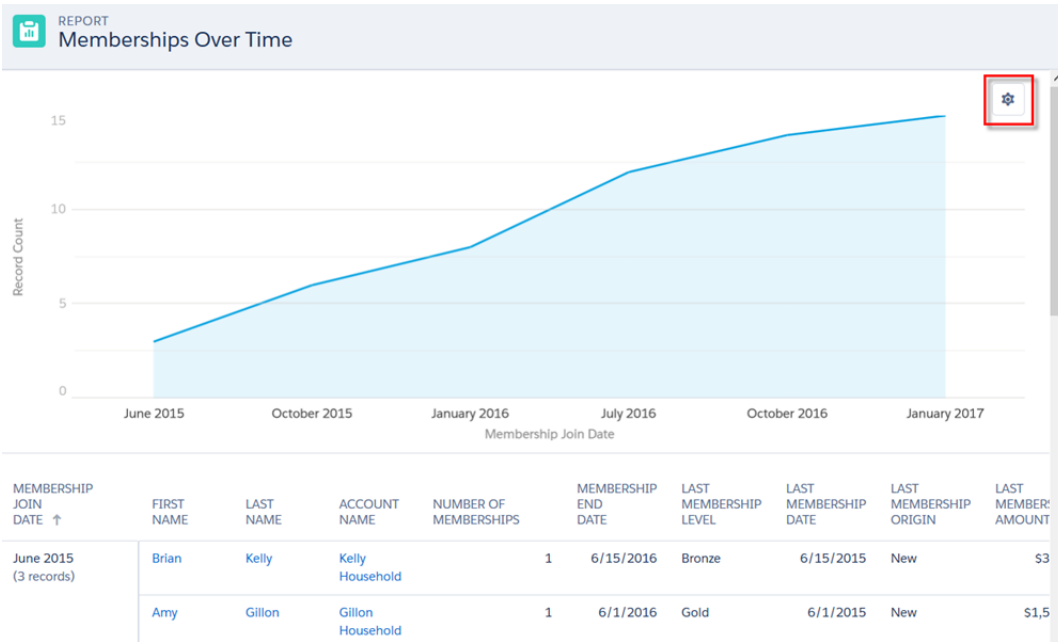
REPORT 15% Increase Projection							
Total Records	Total Total Gifts This Year	Total Total Gifts Last Year	Total Last Gift Amount	15% Increase Over Last Year			
76	\$15,475.00	\$92,480.00	\$81,420.00	\$106,352.00			
ACCOUNT NAME ↑	RECORD COUNT	TOTAL GIFTS THIS YEAR Sum	TOTAL GIFTS LAST YEAR Sum	LAST GIFT AMOUNT Sum	15% INCREASE OVER LAST YEAR	15% INCREASE OVER LAST GIFT	
Acme	1	\$10,000.00	\$5,000.00	\$10,000.00	\$5,750.00	\$11,500.00	
Adams Household	1	\$1,200.00	\$1,200.00	\$1,200.00	\$1,380.00	\$1,380.00	
Addison and Moore Household	1	\$0.00	\$175.00	\$175.00	\$201.25	\$201.25	
Albers Household	1	\$200.00	\$0.00	\$100.00	\$0.00	\$115.00	
Anderson Household	1	\$0.00	\$50.00	\$50.00	\$57.50	\$57.50	
Avery Household	1	\$0.00	\$100.00	\$100.00	\$115.00	\$115.00	
Berger Household	1	\$0.00	\$450.00	\$450.00	\$517.50	\$517.50	
Bohannon Household	1	\$250.00	\$2,000.00	\$250.00	\$2,300.00	\$287.50	
Brumit and Randolph Household	1	\$0.00	\$795.00	\$295.00	\$914.25	\$339.25	
Buhl Household	1	\$80.00	\$50.00	\$80.00	\$57.50	\$92.00	
Castro Household	1	\$0.00	\$500.00	\$500.00	\$575.00	\$575.00	

TUTORIAL: Customize the Memberships Over Time Report

Key Learning Objective: Customize the report chart

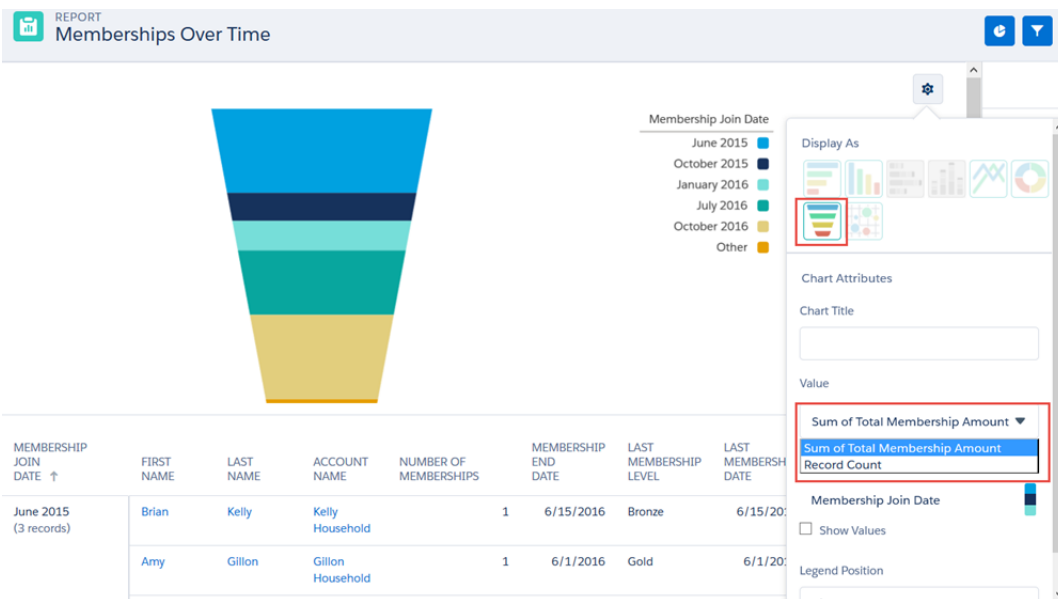
The Memberships Over Time report provides you with a line chart that shows all of the Memberships over the life of your organization and groups them by Membership Join Date. There are many ways you could customize this report, but perhaps the most common is to change the chart type. For example, you prefer a funnel chart and you'd like to see the Total Membership Amount listed for each month. The report details are grouped by when members joined (Membership Join Date), but you'd also like to see members grouped by Membership Level. Let's walk through how to customize this report.

1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Constituent Reports**.
3. Click **Memberships Over Time**.
4. To edit the chart, click the gear icon on the upper right side.



From here you can change the chart type, edit the value, change chart colors, and give the chart a title.

5. You want to use a funnel chart, so click the funnel icon. Then choose Sum of Total Membership Amount as the Value.



6. Click outside the Chart details, then click **Edit**.
7. To group by membership level, drag the Last Membership Level column to the drop zone underneath the Membership Join Date.

First Name	Last Name	Account Name	Number of Memberships	Membership End Date	Last Membership Level	Last Membership Date	Last Membership Origin
Membership Join Date: June 2015 (3 Records)							
Drop a field here to create a grouping. Hide							
Brian	Kelly	Kelly Household	1	6/15/2016	Bronze	6/15/2015	New
Amy	Gillon	Gillon Household	1	6/1/2016	Gold	6/1/2015	New
Aliza	Nunez	Nunez Household	1	6/15/2016	Gold	6/15/2015	New
Membership Join Date: October 2015 (3 Records)							
Jane	Howard	Speed and Howard Household	1	10/10/2016	Silver	10/10/2015	New
James	Gunter	Gunter Household	1	10/10/2016	Bronze	10/10/2015	New
Frederick	Burch	Burch Household	1	10/1/2016	Bronze	10/1/2015	New
Membership Join Date: January 2016 (2 Records)							
Frances	Anderson	Anderson Household	1	1/15/2017	Silver	1/15/2016	New
Ana	Castro	Castro Household	1	1/15/2017	Silver	1/15/2016	New

- Click **Save As**.
- Save the report with a unique name, such as Memberships Over Time Funnel, and choose the folder where to save it. As mentioned earlier, we recommend creating a new folder just for your customized NPSP reports.

Save Report As Help for this Page ? X

Report Name

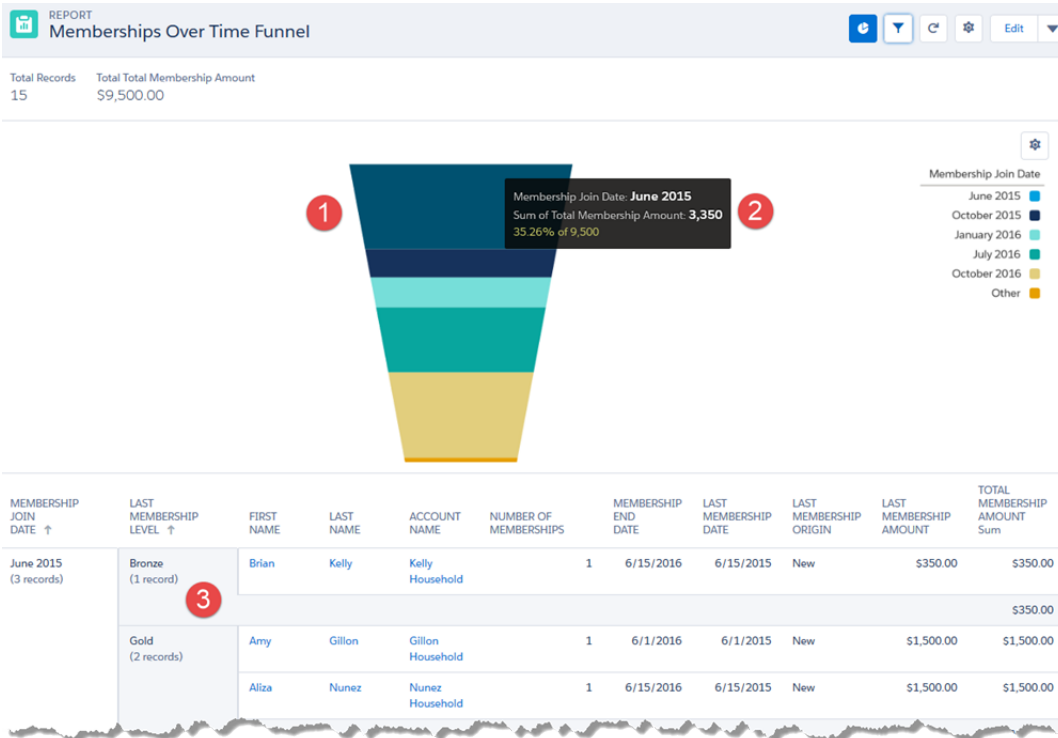
Report Unique Name i

Report Description

Report Folder

- Click **Save** or **Save and Run Report**.

And there you have it. Your new report shows the funnel chart (1). When you hover over the funnel, you see the Sum Total Membership Amount for that month (2). In the report details, you also see that within each month grouping, the rows are then grouped by Membership Level (3).

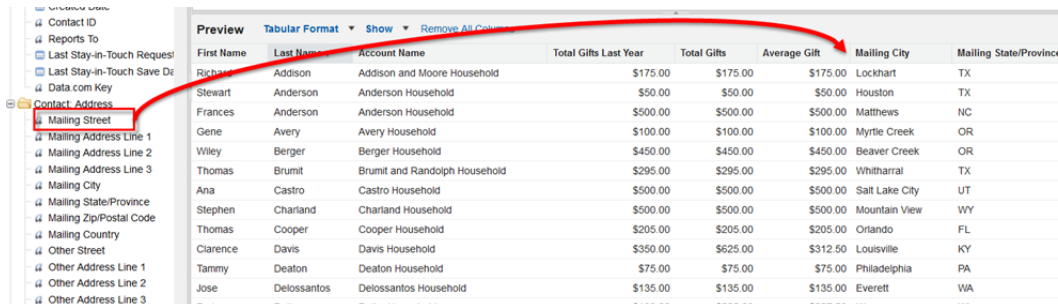


TUTORIAL: Customize the Contact LYBUNT Report


Key Learning Objective: Refine the report by applying cross filters

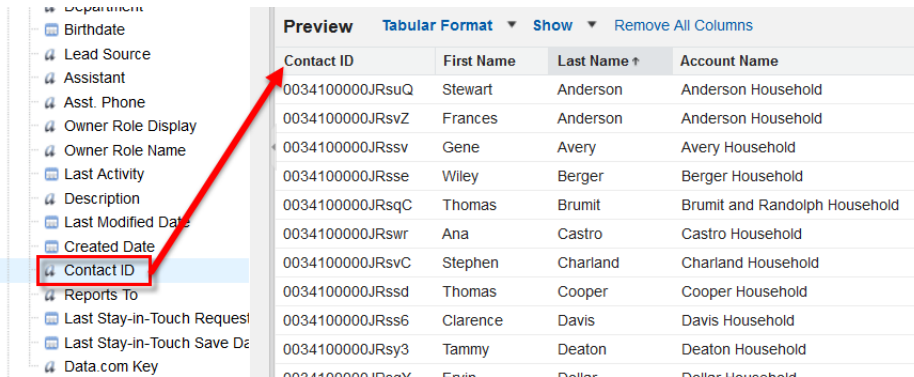
The Contact LYBUNT report shows Contacts who gave last year, but haven't given this year. It's a useful report for viewing Contacts that never responded to a certain Campaign. Let's say you want to generate a mailing list of everyone who gave last year, but not yet this year. But, you just did a mailing for your Annual Giving Campaign last week and you don't want to reach out to anyone who you already sent that Campaign to. Let's customize the report to create this mailing list.

1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Fundraising Reports**.
3. Click **Contact LYBUNT**.
4. Click **Edit**.
5. Since this report will be exported for use as a mailing list, we'll need to add the Mailing Street. Drag the Mailing Street from the left side to just before the Mailing City column.



6. Add the Contact ID field by dragging it from the left side to the far left side of the report (it becomes the first column).

 **Note:** It's best practice to include the Contact ID field as a column in your report. After the mailing, you may find that some of the addresses are incorrect or out of date, and the ID column will help you easily match up the errors with the original Contact records.



7. Click **Run Report** to see your new fields.

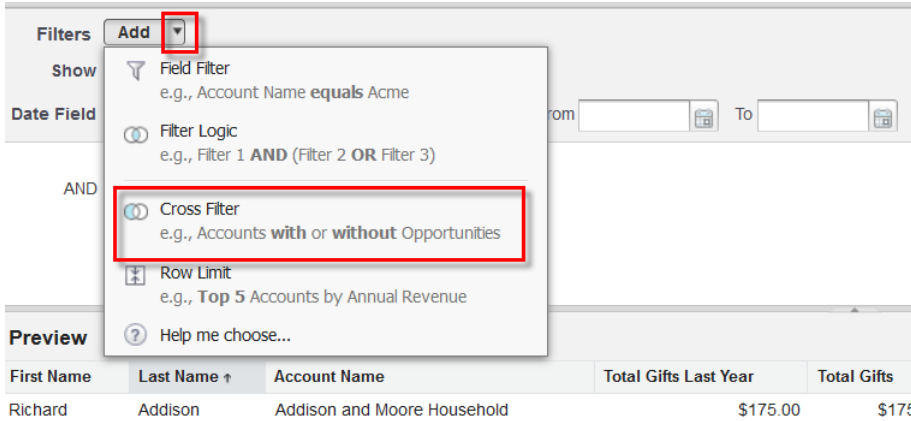
REPORT Contact LYBUNT											
Total Records	Total Total Gifts Last Year	Average Total Gifts Last Year	Total Total Gifts	Average Total Gifts							
43	\$10,495.00	\$244.07	\$13,280.00	\$308.84							
CONTACT ID	FIRST NAME	LAST NAME ↑	ACCOUNT NAME	TOTAL GIFTS LAST YEAR	TOTAL GIFTS	AVERAGE GIFT	MAILING STREET	MAILING CITY	MAILING STATE/PROVINCE	PHONE	EMAIL
0034100000JRsqR	Richard	Addison	Addison and Moore Household	\$175.00	\$175.00	\$175.00	1727 Bubby Drive	Lockhart	TX	(512) 398-3743	richardcaddison@rhyta.com
0034100000JRsuQ	Stewart	Anderson	Anderson Household	\$50.00	\$50.00	\$50.00	4407 Blind Spring Lane	Houston	TX	(281) 489-7353	stewartkanderson@dayrep.com
0034100000JRsvZ	Frances	Anderson	Anderson Household	\$500.00	\$500.00	\$500.00	3413 Harry Place	Matthews	NC	(704) 762-6643	francesmanderson@einrot.com
0034100000JRssv	Gene	Avery	Avery Household	\$100.00	\$100.00	\$100.00	4981 Skinner Hollow Road	Myrtle Creek	OR	(541) 860-7434	genetavery@teleworm.us
0034100000JRsse	Wiley	Berger	Berger Household	\$450.00	\$450.00	\$450.00	3446 Godfrey Street	Beaver Creek	OR	(503) 632-2347	wileyberger@fleckens.hu

What a great start! Your two new fields are helping to shape this mailing list. Before we add any filters to this report, check out the first entry, Richard Addison. Richard meets the criteria for the Contact LYBUNT report, so you see his name listed in the results. Let's see what happens to Richard when we filter out Contacts to whom we sent the Annual Giving Campaign last week. (We'll let you in on a little secret: we sent it to Richard.)

8. Click **Edit** in the upper right corner of the report.

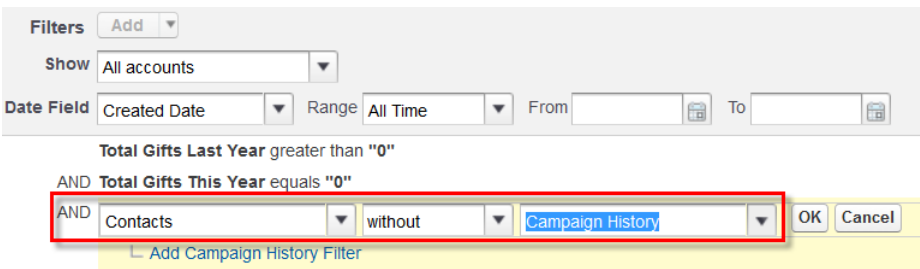


9. In the Filter field, click the drop-down next to Add (don't click Add), then click **Cross Filter**.

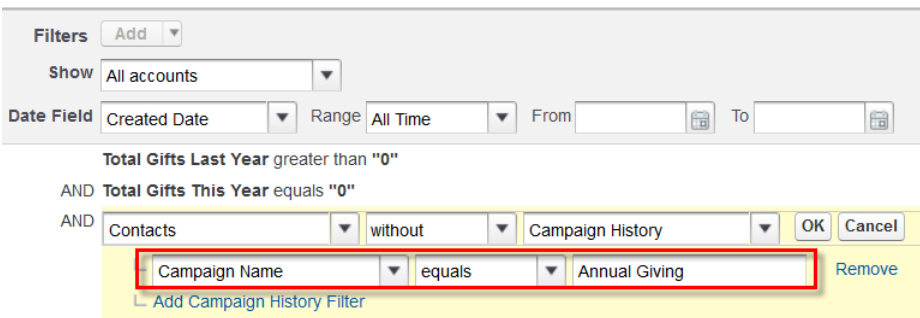


10. Enter *Contacts without Campaign History*, then click **Add Campaign History Filter**.

Note: You're adding this filter not to exclude all Contacts who don't have an associated Campaign, but specifically to filter out all Contacts who DO NOT meet the criteria you're going to specify in the subsequent Campaign History filters.



11. Enter *Campaign Name equals Annual Giving* (replace the example Annual Giving Campaign with your own Campaign name), then click **OK**.



Your customized filters should look like this:

Filters Add

Show All accounts

Date Field Created Date Range All Time From To

Total Gifts Last Year greater than "0"
 AND Total Gifts This Year equals "0"
 AND Contacts without Campaign History
 └ Campaign Name equals "Annual Giving"

12. Click **Save As** and save your report with a unique name (you don't want to overwrite the original report!). Also, select a folder where you want to save the report.

Save Report As Help for this Page

Report Name

Report Unique Name

Report Description

Report Folder Customized NPSP Reports

Save Save and Run Report Cancel

13. Click **Save and Run Report**.

On the report, you'll notice that Richard Addison no longer appears. Since Richard was sent the Annual Giving Campaign, he was excluded from this report so that we don't reach out to him twice in a period of weeks.

REPORT **Contact LYBUNT without Annual Giving**

Total Records: 36 Total Total Gifts Last Year: \$8,615.00 Average Total Gifts Last Year: \$239.31 Total Total Gifts: \$10,415.00 Average Total Gifts: \$289.31

CONTACT ID	FIRST NAME	LAST NAME	ACCOUNT NAME	TOTAL GIFTS LAST YEAR	TOTAL GIFTS	AVERAGE GIFT	MAILING STREET	MAILING CITY	MAILING STATE/PROVINCE	PHONE	EMAIL
0034100000IRvZ	Frances	Anderson	Anderson Household	\$500.00	\$500.00	\$500.00	3413 Harry Place	Matthews	NC	(704) 762-6643	francesmanderson@einrot.com
0034100000IRuQ	Stewart	Anderson	Anderson Household	\$50.00	\$50.00	\$50.00	4407 Bird Spring Lane	Houston	TX	(281) 489-7353	stewartkanderson@dayrep.com
0034100000IRsv	Gene	Avery	Avery Household	\$100.00	\$100.00	\$100.00	4981 Skinner Hollow Road	Myrtle Creek	OR	(541) 860-7434	genetavery@teleworm.us
0034100000IRse	Wiley	Berger	Berger Household	\$450.00	\$450.00	\$450.00	3446 Godfrey Street	Beaver Creek	OR	(503) 632-2347	wileyberger@fleckens.hu
0034100000IRsqC	Thomas	Brumit	Brumit and Randolph Household	\$295.00	\$295.00	\$295.00	3080 Hilltop Drive	Whitharral	TX	(806) 299-1093	thomassbrumit@superrito.com
0034100000IRsw	Ana	Castro	Castro Household	\$500.00	\$500.00	\$500.00	2645 Tori Lane	Salt Lake City	UT	(801) 617-5385	anajcastro@superrito.com

TUTORIAL: Customize the Closed/Won Opps by Type and Fiscal Year Report

Key Learning Objective: Edit a matrix report

The Closed/Won Opps by Type and Fiscal Year report is a great tool for viewing giving at a high-level year over year. The information is presented in a useful matrix, and is organized by Opportunity Type and Fiscal Year. But, let's say you want the data organized first by the type of Account and you want to see giving organized by calendar year instead of fiscal year. Since there is no field for calendar year (like there is for fiscal year), we'll also need to add the Close Date field so we can group by calendar year. You also want to see a record count. Let's try it out!

1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Fundraising Reports**.
3. Click **Closed/Won Opps by Type and Fiscal Year**.
4. Click **Edit**.

FISCAL YEAR		2015	2016	2017
OPPORTUNITY RECORD TYPE	ACCOUNT RECORD TYPE	SUM OF AMOUNT Sum	SUM OF AMOUNT Sum	SUM OF AMOUNT Sum
Donation	Household Account	\$8,915.00	\$9,750.00	\$0.00
Grant	Household Account	\$0.00	\$200.00	\$0.00
	Organization	\$0.00	\$15,000.00	\$0.00
In-Kind Gift	Household Account	\$0.00	\$220.00	\$0.00
Major Gift	Organization	\$0.00	\$0.00	\$10,000.00
Matching Gift	Household Account	\$0.00	\$495.00	\$0.00

5. To change the report to sort first by type of Account, drag the Account Record Type column to before the Opportunity Record Type.

Preview		Matrix Format	Show	Remove All Columns
		Fiscal Year	2015	Grand Total
		Drop a field here to create a column grouping.		
		Drop summarizable fields into the matrix.		
Opportunity Record Type	Account Record Type	Sum of Amount	\$5,110.00	\$5,110.00
Donation	Household Account	Sum of Amount	\$5,110.00	\$5,110.00
		Subtotal	Sum of Amount	\$5,110.00
		Grand Total	Sum of Amount	\$5,110.00

6. To show a record count, click **Show**, then click **Record Count**.

Preview		Matrix Format	Show	Remove All Columns
		Fiscal Year	2015	Grand Total
		Drop a field here to create a column grouping.		
		Drop summarizable fields into the matrix.		
Account Record Type	Opportunity Record Type	Sum of Amount	\$5,110.00	\$5,110.00
Household Account	Donation	Sum of Amount	\$5,110.00	\$5,110.00
		Subtotal	Sum of Amount	\$5,110.00
		Grand Total	Sum of Amount	\$5,110.00

You'll see the Record Count appear under the Fiscal Year column.

Preview Matrix Format Show Remove All Columns

		Fiscal Year	2015	Grand Total
		Drop a field here to create a column grouping.		
Account Record Type	Opportunity Record Type	Drop summarizable fields into the matrix.		
Household Account	Donation	Sum of Amount	\$5,110.00	\$5,110.00
		Record Count	20	20
	Subtotal	Sum of Amount	\$5,110.00	\$5,110.00
		Record Count	20	20
Grand Total		Sum of Amount	\$5,110.00	\$5,110.00
		Record Count	20	20

7. To use the Calendar Year instead of the Fiscal Year, first drag the Close Date field from the left side to under the Fiscal Year column.

Opportunity Name
Type
Opportunity Record Type
Lead Source
Primary Partner
Amount
Opportunity Quantity
Expected Revenue
Closed
Won
Close Date
Close Date (2)
Close Month

Preview Matrix Format Show Remove All Columns

		Fiscal Year	2015	Grand Total
		Drop a field here to create a column grouping.		
Account Record Type	Opportunity Record Type	Drop summarizable fields into the matrix.		
Household Account	Donation	Sum of Amount	\$5,110.00	\$5,110.00
		Record Count	20	20
	Subtotal	Sum of Amount	\$5,110.00	\$5,110.00
		Record Count	20	20
Grand Total		Sum of Amount	\$5,110.00	\$5,110.00
		Record Count	20	20

8. Remove the Fiscal Year column by dragging it back to the panel on the left side.

Opportunity Information
Created By
Created Alias
Last Modified By
Last Modified Alias
Opportunity Name
Type
Opportunity Record Type
Lead Source
Primary Partner

Preview Matrix Format Show Remove All Columns

		Fiscal Year	2015	Grand Total
		Close Date	7/18/2014	7/23/2014
Account Record Type	Opportunity Record Type	Drop summarizable fields into the matrix.		
Household Account	Donation	Sum of Amount	\$485.00	\$360.00
		Record Count	1	1
	Subtotal	Sum of Amount	\$485.00	\$360.00
		Record Count	1	1
Grand Total		Sum of Amount	\$485.00	\$360.00
		Record Count	1	1

9. Click the down arrow in the Close Date column, click **Group Dates By**, then click **Calendar Year**.

Preview Matrix Format Show Remove All Columns

		Close Date	7/18/2014	7/23/2014	8/6/2014	8/11/2014	8/12/2014	9/28/2014	10/16/2014	
		Drop a field here to create a column grouping.								
Account Record Type	Opportunity Record Type	Drop summarizable fields into the matrix.								
Household Account	Donation	Sum of Amount	\$255.00							\$255.00
		Record Count	1							1
	Subtotal	Sum of Amount	\$255.00							\$255.00
		Record Count	1							1
Grand Total		Sum of Amount	\$255.00							\$255.00
		Record Count	1							1

Sort Group Ascending
Sort Group Descending
Group Dates By
Move Group Up
Move Group Down
Remove Group

Day
Calendar Week
Calendar Month
Calendar Quarter
Calendar Year
Fiscal Quarter
Fiscal Year
Calendar Month in Year
Calendar Day in Month

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

10. Click **Save As** and save your report with a unique name (you don't want to overwrite the original report!). Also, select a folder where you want to save the report.

Save Report As Help for this Page x

Report Name

Report Unique Name

Report Description

Report Folder

Save Hierarchy Level

11. Either click **Save or **Save and Run Report**.**

Tada! Your final report should look something like this. You see Account Record Type as the top level of organization (1) and Calendar Year instead of Fiscal Year (2). You also see a record count (3) and the Opportunities organized by Close Date. Much different than the original, right? And all it took was a few simple customizations.

REPORT Closed/Won Opps by Account and Cal Year											
Total Records		Total Amount									
79		\$44,580.00									
4 CLOSE DATE		CY2014 2		CY2015		CY2016		CY2017		Total	
ACCOUNT RECORD TYPE	OPPORTUNITY RECORD TYPE	COUNT	SUM OF AMOUNT Sum	3 COUNT	SUM OF AMOUNT Sum	COUNT	SUM OF AMOUNT Sum	COUNT	SUM OF AMOUNT Sum	COUNT	SUM OF AMOUNT Sum
1 Household Account	Donation	19	\$4,785.00	39	\$9,955.00	16	\$3,925.00	0	\$0.00	74	\$18,665.00
	Grant	0	\$0.00	1	\$200.00	0	\$0.00	0	\$0.00	1	\$200.00
	In-Kind Gift	0	\$0.00	1	\$220.00	0	\$0.00	0	\$0.00	1	\$220.00
	Matching Gift	0	\$0.00	1	\$495.00	0	\$0.00	0	\$0.00	1	\$495.00
	Subtotal	19	\$4,785.00	42	\$10,870.00	16	\$3,925.00	0	\$0.00	77	\$19,580.00
Organization	Grant	0	\$0.00	0	\$0.00	1	\$15,000.00	0	\$0.00	1	\$15,000.00
	Major Gift	0	\$0.00	0	\$0.00	0	\$0.00	1	\$10,000.00	1	\$10,000.00
	Subtotal	0	\$0.00	0	\$0.00	1	\$15,000.00	1	\$10,000.00	2	\$25,000.00
Total		19	\$4,785.00	42	\$10,870.00	17	\$18,925.00	1	\$10,000.00	79	\$44,580.00

Now that you've seen how quickly and easily you can customize NPSP reports, we encourage you to go ahead and try it out on some of the other out-of-the-box reports. And if you come up with some cool and useful customizations that you think other Nonprofit Community members might benefit from, be sure to [let us know!](#)

APPENDIX

This Appendix provides instructions on installing the newer NPSP reports, hiding the old reports, and changing report folder access.

[Install the Reports Package](#)

If you started a Trial or installed NPSP prior to version 3.90 (February 2017), you will need to install the NPSP reports in your organization.

[What To Do with Old NPSP Reports and Folders](#)

If your org has the old report folders, we recommend that you phase them out by hiding the folders from your users.

[Update Report Folder Access](#)

You may want to hide the old report folders. Or you may want to change sharing access on the new report folders so that users can only view (not modify) them.

Install the Reports Package

If you started a Trial or installed NPSP prior to version 3.90 (February 2017), you will need to install the NPSP reports in your organization.

To install the NPSP reports:

1. Go to the [NPSP Reports & Dashboards Installer](#).
2. Log in using the credentials for your Salesforce organization.
3. Click **Install**.

What To Do with Old NPSP Reports and Folders

If your org has the old report folders, we recommend that you phase them out by hiding the folders from your users.

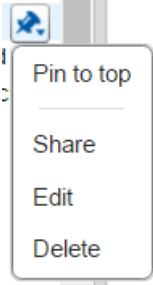
Administrators will still see the old folders. That way, if a user asks for a specific old report, you'll still have access to it. If users don't ask about the old reports for a particular amount of time (defined by you, of course), you can decide if you want to delete the folders and reports.


Update Report Folder Access

You may want to hide the old report folders. Or you may want to change sharing access on the new report folders so that users can only view (not modify) them.

To hide the old reports folders from users:







1. Switch to Salesforce Classic. You can't currently set sharing permissions on folders in Lightning Experience.
2. Click the **Reports** tab.
3. Hover over the name of the folder you want to hide, click the Pin icon, then click **Share**.



- 4. To hide this folder from the user, click  next to the user's name. We recommend you hide the old NPSP 3.0 folders from all non-Admin users.

Share: NPSP 3.0 Donor Management Reports Help for this Page ? x

Share with: [Users](#), [Public Groups](#)

All (6)	Access	
Alex Garcia User	Viewer ▾	
Leslie Anderson User	Viewer ▾	
Matthew Wong User	Viewer ▾	
Meredith Williams User	Viewer ▾	
Sarah Marovich User	Manager ▾	
Vera Smith User	Viewer ▾	

Close

- 5. To change folder access so that users can only view reports, but not edit them, make sure Access is set to `Viewer`. We recommend you give Viewer access on the new NPSP report folders to all non-Admin users.

Share: NPSP Fundraising Reports Help for this Page ? x

Share with: [Users](#), [Public Groups](#)

All (5)	Access
Admin User User	Editor ▼ x
Leslie Anderson User	Editor ▼ x
Matthew Wong User	Viewer ✓ Editor x
Meredith Williams User	Manager x
Vera Smith User	Editor ▼ x

Close

6. Click **Close**.