

# Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

## Hands-On Workshop Guide

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## Agenda

Each Base Camp session includes a hands-on element. Today's focus is on reports and dashboards.

Together we will:

- Review the campaign record for a direct mail campaign.
- Customize the NPSP Campaign ROI Analysis report.
- Create a new Campaigns and Contacts report.
- Review the NPSP Campaign ROI Analysis dashboard.
- Subscribe to the NPSP Campaign ROI Analysis dashboard.

## Generate Your Workshop Org

The first thing you need to do is spin up a practice environment.

1. Navigate to <https://sforce.co/BaseCampWorkshop>
2. Wait for the deployer to run. It will take about 10 minutes to generate your org.
3. When the org is ready, click **Launch**. You can safely ignore the error message.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

 Salesforce DX Public Deployer

Deploying sfdo-csg-nonprofit-16428761113258c 100% Complete

**An error occurred while deploying.** See the browser console logs for more information.  
A scratch org was created with username test-9eufuenm9odz@example.com, but the settings failed to deploy

**Note:** It can take up to 5 minutes for the DNS to propagate. If the scratch org doesn't load properly, wait a few minutes to launch.

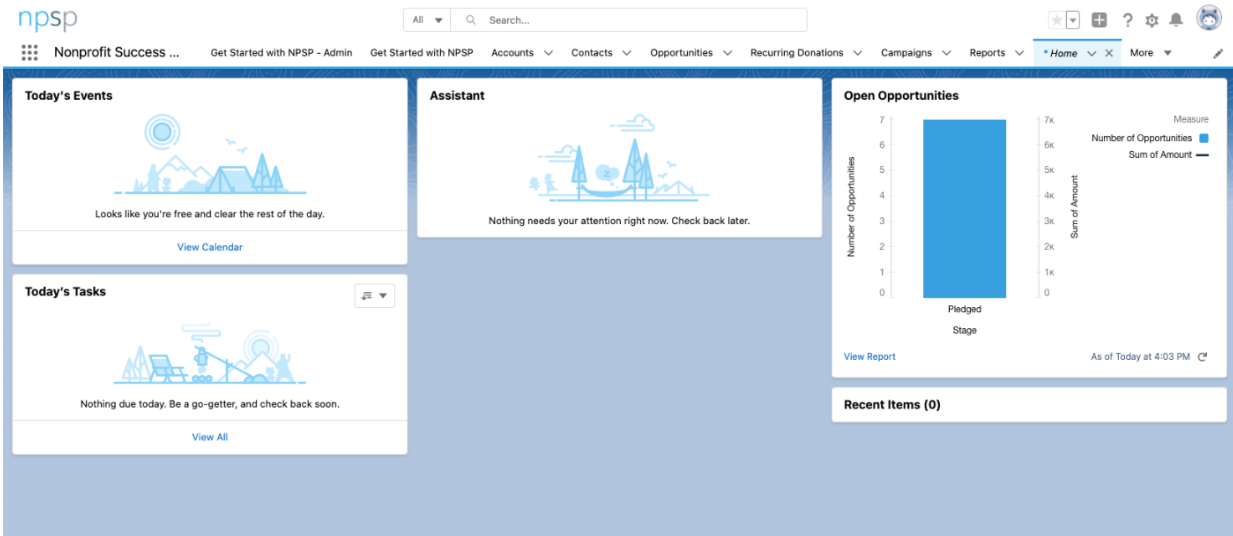
Your org is ready! Delete Launch

**Note:** Use the Launch button above to login for the first time  
The credentials are for other uses (mobile app, integrations).  
They auth to a sandbox (test.salesforce.com) not production (login.salesforce.com)  
These credentials/button will continue working after the session-based Launch button stops.

Your username is and your password is |whg6ubbTnsxd Launch via credentials

## Log In to Your Workshop Org

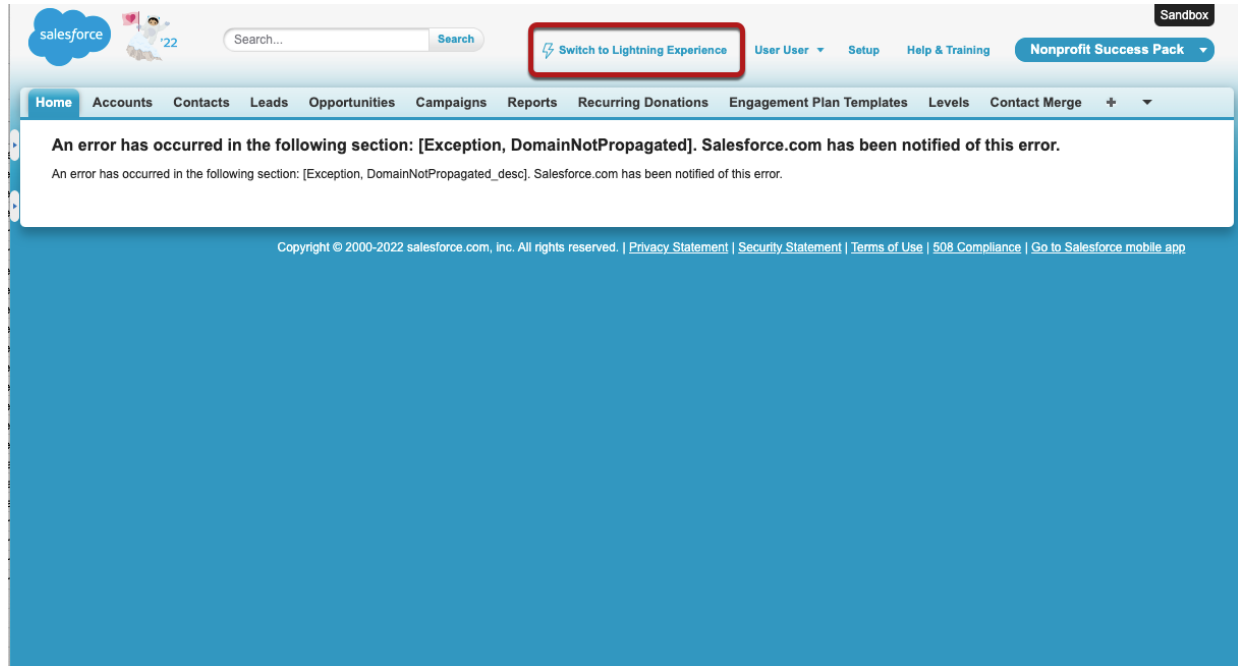
When you launch your workshop, you will begin on a homepage that includes Today's Events and Today's Tasks. Since this is a brand new org, you won't see any tasks assigned to you.



## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

### What if My Screen Doesn't Look Like That?

If you receive an error upon logging in—such as in the screenshot below—click **Switch to Lightning Experience** at the top of the page.



### Before We Begin

In today's workshop, we'll walk through step-by-step instructions to create reports and dashboards to better understand our fundraising campaigns. For these examples, we'll use NPSP straight out-of-the-box without any customizations. We've included *Think Like an Admin Tips* to point out where you might want to customize Salesforce for your own nonprofit. We provide you with how-to resources at the end of this guide for those who want to learn more.

Let's get started!

## Campaigns

### REVIEW A CAMPAIGN RECORD

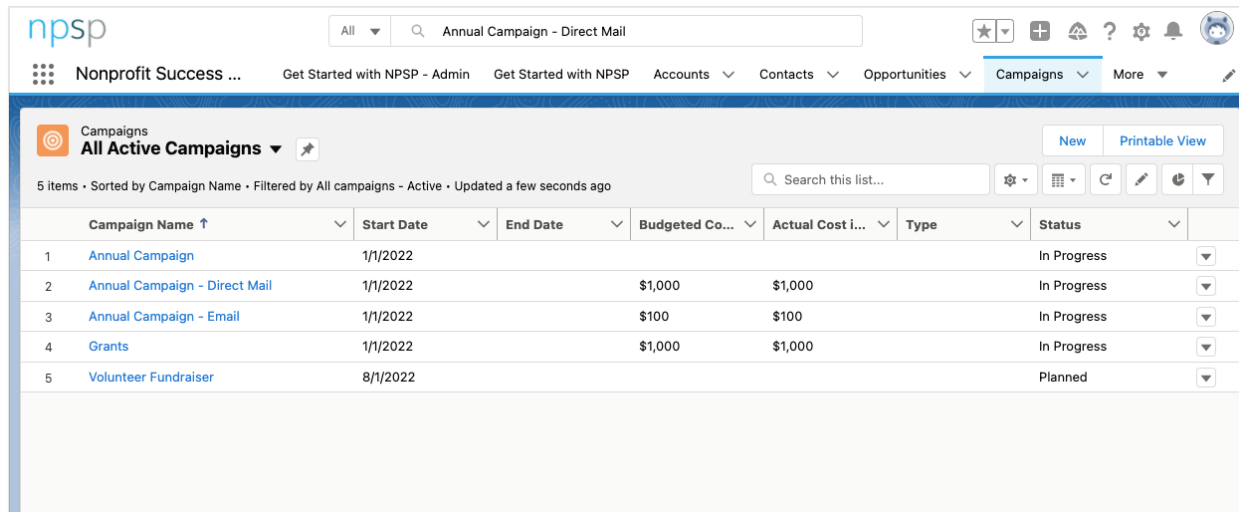
Let's take a look at a campaign record to understand how they work. Campaigns are a planned set of communications, be it digital or analog, that move people toward a specific goal, like asking supporters to volunteer, donate, or buy a tote bag. You can tie fundraising opportunities back to a campaign, too, allowing you to analyze your outreach efforts.

Our example nonprofit, COACH, reaches out to all past supporters by direct mail and email through its annual campaign. COACH's staff wants to understand the costs and effectiveness of each method. We're going to look at the direct mail campaign as an example.

1. Click the **Campaigns** tab. Since this is a brand-new org, we will not see any records in the Recently Viewed list view.
2. Click **Recently Viewed** to show available list views, then click **All Active Campaigns**.

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3. Click the **Annual Campaign - Direct Mail** campaign.



The screenshot shows the Salesforce NPSP interface. The top navigation bar includes the NPSP logo, a search bar with "Annual Campaign - Direct Mail", and various utility icons. The main navigation menu shows "Nonprofit Success ..." and several sub-menus. The "Campaigns" menu is selected, displaying "All Active Campaigns". Below this, a summary bar indicates "5 items • Sorted by Campaign Name • Filtered by All campaigns - Active • Updated a few seconds ago". A search bar and action icons are present. The main table lists the following campaigns:

|   | Campaign Name ↑                               | Start Date | End Date | Budgeted Co... | Actual Cost i... | Type | Status      |
|---|-----------------------------------------------|------------|----------|----------------|------------------|------|-------------|
| 1 | <a href="#">Annual Campaign</a>               | 1/1/2022   |          |                |                  |      | In Progress |
| 2 | <a href="#">Annual Campaign - Direct Mail</a> | 1/1/2022   |          | \$1,000        | \$1,000          |      | In Progress |
| 3 | <a href="#">Annual Campaign - Email</a>       | 1/1/2022   |          | \$100          | \$100            |      | In Progress |
| 4 | <a href="#">Grants</a>                        | 1/1/2022   |          | \$1,000        | \$1,000          |      | In Progress |
| 5 | <a href="#">Volunteer Fundraiser</a>          | 8/1/2022   |          |                |                  |      | Planned     |

The campaign record houses a wealth of information about the campaign. Scroll down the Details panel to review summary information about this campaign, including the number of contacts in the campaign, the number of direct mail pieces mailed, and the cost of the campaign. We can also review the number and value of opportunities that have come in as a result.

Notice that the Parent Campaign field is populated with the Annual Campaign campaign record. We can link campaigns together into a campaign hierarchy using the Parent Campaign field. In this case, the Annual Campaign is the parent campaign for the Annual Campaign - Direct Mail and Annual Campaign - Email campaigns.

*Think Like an Admin Tip:* Add Campaign Hierarchy fields to your campaign page layouts to see child campaign statistics roll up to the parent campaign—they aren't there by default.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

 Campaign

**Annual Campaign - Direct Mail**

|                                     |                                 |
|-------------------------------------|---------------------------------|
| Active                              | Parent Campaign                 |
| <input checked="" type="checkbox"/> | <a href="#">Annual Campaign</a> |
| Type                                | Start Date                      |
|                                     | 1/1/2022                        |
| Status                              | End Date                        |
| In Progress                         |                                 |

▼ Campaign Description

Description

Annual direct mail campaign to supporters

▼ Campaign Member Information

Contacts in Campaign

17

Responses in Campaign

17

Expected Response (%)

10.00%

Num Sent in Campaign

1,000

▼ Donation Information

Won Opportunities in Campaign

17

Amount to Goal

\$3,200.00

Value Won Opportunities in Campaign

\$1,800

Expected Revenue in Campaign

\$5,000

Opportunities in Campaign

17

Budgeted Cost in Campaign

\$1,000

Value Opportunities in Campaign

\$1,800

Actual Cost in Campaign

\$1,000

Click the **Related** tab to review the individual campaign members and opportunities related to this campaign. You can click the **View All** link on either related list to see all records. Note that your scratch org may not have the 'Opportunities related list. We've included a screenshot here for you to review.

 Campaign

**Annual Campaign - Direct Mail**

Details

**Related**

Activity

 Campaign Members

[Add Contacts](#) [Import Leads and Contacts](#)

Number of Members

17

17

[View All](#)

 Opportunities (6+)

[New](#)

[Eamon Bastin Donation 12/19/2022 2022 Annual Campaign - Direct Mail](#)

Stage: Closed Won

Amount: \$50.00

Close Date: 12/19/2022

[Isabel Macoun Donation 12/14/2022 2022 Annual Campaign - Direct Mail](#)

Stage: Closed Won

Amount: \$250.00

Close Date: 12/14/2022

[Serena Durbin Donation 10/27/2022 2022 Annual Campaign - Direct Mail](#)

Stage: Closed Won

Amount: \$100.00

Close Date: 10/27/2022

[Wells Hook Donation 08/22/2022 2022 Annual Campaign - Direct Mail](#)

Stage: Closed Won

Amount: \$75.00

Close Date: 8/22/2022

[Lisa Bowditch Donation 08/10/2022 2022 Annual Campaign - Direct Mail](#)

Stage: Closed Won

[Harp Turrell Donation 07/20/2022 2022 Annual Campaign - Direct Mail](#)

Stage: Closed Won

# Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

*Think Like an Admin Tip:* Nonprofits use campaign records to plan and track fundraising appeals, solicitations, events, advocacy campaigns, and other outreach activities.

## Reports

### CUSTOMIZE AN NPSP REPORT

One way to understand the effectiveness of a particular campaign is to look up the campaign record as we just did. But reports can help us analyze our campaigns broadly.

Fortunately, NPSP comes with 87 pre-built reports and dashboards. You can use these reports as they are, adapt them for your particular needs, or both!

Let's take a look at what's included in NPSP.

1. Click the **Reports** tab.
2. Click **All Folders**.
3. This page lists several folders, including four report folders for NPSP reports: NPSP Constituent Reports, NPSP Dashboard Reports, NPSP Fundraising Reports, and NPSP Health Check.

*Think Like an Admin Tip:* User access to reports is controlled by folders. If you have access to a folder, you have Read or Edit access to all the reports in that folder.

4. Click the **NPSP Fundraising Reports** folder.
5. Click the **Campaign ROI Analysis** report. While you find it, notice the wide variety of fundraising reports included in NPSP.

*Think Like an Admin Tip:* The NPSP Reports Workbook will walk you through how to customize NPSP reports to suit your unique needs. This community-created resource is a great tool for learning about Salesforce reports generally. Check it out in the Resources section.

Now let's customize this report. The report includes a number of campaigns. The exact records we see in any report will depend on three things: report type, filters, and columns (fields).

At the top of the page, above the Campaign ROI Analysis title, we can see this report is based on records from the Campaign object. This means that it will only include high-level campaign records—we will not see any details about individual opportunities or campaign members in this report. For that, we would need to find a report with a different report type. We'll create a Campaigns with Contacts report in our next example.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards



| Campaign Name                 | Sum of Actual Cost in Campaign | Sum of Value Won Opportunities in Campaign | Sum of Won Opportunities in Campaign | Average ROI | Record Count |
|-------------------------------|--------------------------------|--------------------------------------------|--------------------------------------|-------------|--------------|
| Annual Campaign - Direct Mail | \$1,000                        | \$1,800                                    | 17                                   | 80%         | 1            |
| Annual Campaign - Email       | \$100                          | \$1,485                                    | 13                                   | 1,385%      | 1            |
| Grants                        | \$1,000                        | \$0                                        | 0                                    | -100%       | 1            |
| Volunteer Fundraiser          | \$500                          | \$0                                        | 0                                    | -100%       | 1            |

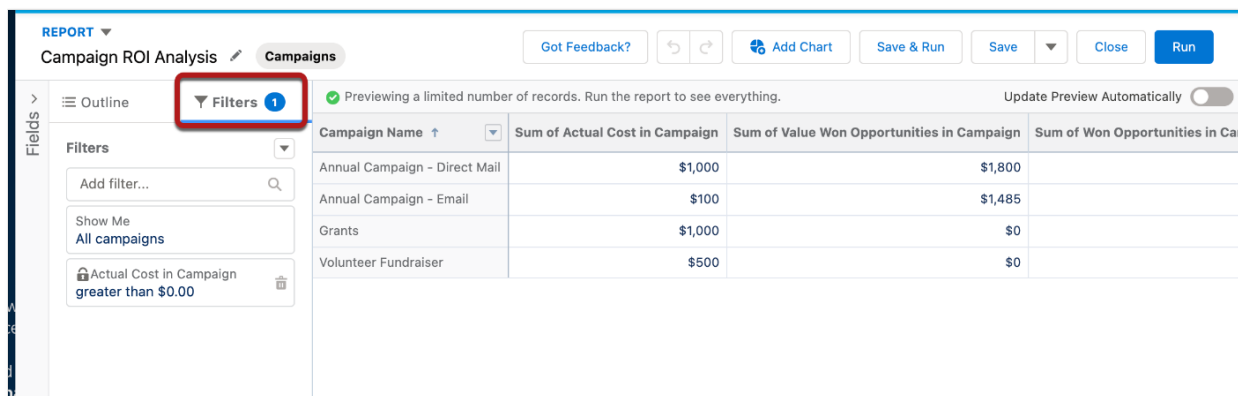
To see which filters are applied to this report, click the funnel at the top right of the report. This report is filtered to all campaigns with actual costs greater than \$0.

Let's say we're only interested in our direct mail and email campaigns, so we want to narrow our report a bit. Let's change these filters.

1. Click **Edit**.
2. The Lightning Report Builder report opens up. The Lightning Report Builder includes a few different sections. First is the Outline section which allows us to choose the columns we want to display. We can also create groupings by row or column. We are happy with the columns that are included, so we'll leave those as is.
3. Click the **Filters** tab. This Filters section of the Lightning Report Builder allows us to hone in on the exact data we need by using parameters based on a field value or date.
4. Find and select **Campaign Type** using the **Add filter...** search box. Select **Direct Mail** and **Email** from the list of values.
5. Click **Apply**.
6. Click **Run**.

Now the report will only include our direct mail and email results.

Optionally, we can also toggle on **Subtotals** and **Grand Total** at the bottom of the report to see summary rows populate in the top panel.



| Campaign Name                 | Sum of Actual Cost in Campaign | Sum of Value Won Opportunities in Campaign | Sum of Won Opportunities in Campaign |
|-------------------------------|--------------------------------|--------------------------------------------|--------------------------------------|
| Annual Campaign - Direct Mail | \$1,000                        | \$1,800                                    |                                      |
| Annual Campaign - Email       | \$100                          | \$1,485                                    |                                      |
| Grants                        | \$1,000                        | \$0                                        |                                      |
| Volunteer Fundraiser          | \$500                          | \$0                                        |                                      |

This report looks helpful, so let's save it for later.

1. To avoid overwriting the original report, click **Save As**. It may be under the **More Actions** menu next to Edit.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

2. Change the Report Name to **Email and Direct Mail Campaign ROI**
3. Click **Select Folder**.
4. Click **All Folders**.
5. Click **Private Reports**. Only you have access to your Private folder, so it's a great place to practice your report-building skills.
6. Click **Select Folder**.
7. Click **Save**.

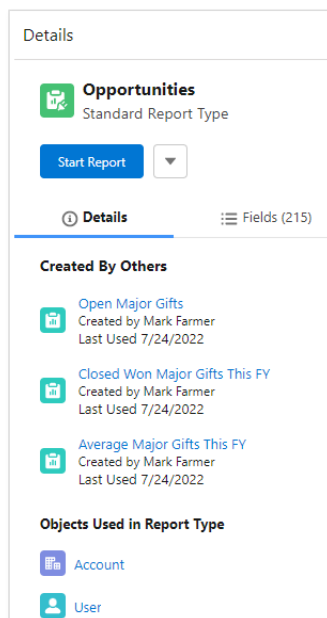
*Think Like an Admin Tip:* Learn how to set folder access to Read Only so that no one accidentally overwrites your template NPSP reports. You can find instructions in the NPSP Reports Workbook linked in Resources.

### CREATE A NEW REPORT

Many times, an existing NPSP report already suits our needs—but sometimes we may need to create a new report.

COACH wants to review their donation records over the last couple of years, to get a sense of any annual trends. They start by creating an Opportunity report.

1. Click the **Reports** tab, which will bring us to a page listing the Campaign ROI Analysis report and the report we just created.
2. Click **New Report**.
3. Now we need to choose a report type. Report types are templates that select the objects and fields we want to include in our report. Select **Opportunities** on the left side.
4. On the right side, click **Opportunities**.
  - a. Think like an Admin Tip: in the panel on the right side, you can view all of the Objects Used in the Report Type at the bottom of the Details tab, and all of the Fields available in the Fields tab - You can check here to make sure a report type will meet your needs before starting to build the report
5. Click **Start Report**.



# Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

## Tabular Reports

A tabular report shows a lot of details, which isn't exactly what we need right now - but the fields we select here will also be shown when we choose to show the details after we start creating grouping, so you can decide what fields are useful when you want to dive deeper into a section of your data.

Now we'll add the columns we want to include.

1. In the **Outline**, click into the **Add column...** box to find and select two columns:
  - a. **Primary Contact**
  - b. **Opportunity Record Type**
2. Click **Filters**.
3. Click the **Close Date** filter and select **All Time**.
4. Click **Apply**.
5. Click the **Opportunity Status** filter and select **Closed Won**.
6. Click **Apply**.
7. Click **Run** to see our results.

*Think Like an Admin Tip:* If you need more objects or fields than a standard report type provides, you can create a custom report type. Check out the Resource Guide for more details

| Report: Opportunities<br>New Opportunities Report |            |                   |                       |                                                                |            |               |             |                  |                 |     |            |
|---------------------------------------------------|------------|-------------------|-----------------------|----------------------------------------------------------------|------------|---------------|-------------|------------------|-----------------|-----|------------|
| Total Records<br>73                               |            |                   |                       |                                                                |            |               |             |                  |                 |     |            |
|                                                   | Owner Role | Opportunity Owner | Account Name          | Opportunity Name                                               | Stage      | Fiscal Period | Amount      | Expected Revenue | Probability (%) | Age | Close Date |
| 1                                                 | -          | Mark Farmer       | Black Household       | Anna Black Donation 07/15/2020 Annual Campaign - Direct Mail   | Closed Won | Q3-2020       | \$100.00    | \$100.00         | 100%            | 0   | 7/15/2020  |
| 2                                                 | -          | Mark Farmer       | Kumar Family Fund     | Kumar Family Fund \$10000 Gift 01/12/2021                      | Closed Won | Q1-2021       | \$10,000.00 | \$10,000.00      | 100%            | 0   | 1/12/2021  |
| 3                                                 | -          | Mark Farmer       | Macdonald Family Fund | Macdonald Family Fund \$20000 Gift 04/13/2021                  | Closed Won | Q2-2021       | \$20,000.00 | \$20,000.00      | 100%            | 0   | 4/13/2021  |
| 4                                                 | -          | Mark Farmer       | Black Household       | Anna Black Donation 08/05/2021 Annual Campaign - Email         | Closed Won | Q3-2021       | \$150.00    | \$150.00         | 100%            | 0   | 8/5/2021   |
| 5                                                 | -          | Mark Farmer       | Hayes Household       | Gena Hayes Major Gift 08/30/2021 Major Gifts                   | Closed Won | Q3-2021       | \$15,000.00 | \$15,000.00      | 100%            | 0   | 8/30/2021  |
| 6                                                 | -          | Mark Farmer       | Bullar Household      | Christian Bullar Major Gift 11/22/2021 Major Gifts             | Closed Won | Q4-2021       | \$50,000.00 | \$50,000.00      | 100%            | 0   | 11/22/2021 |
| 7                                                 | -          | Mark Farmer       | Mash Household        | Jayne Mash Donation 01/12/2022 Annual Campaign - Direct Mail   | Closed Won | Q1-2022       | \$100.00    | \$100.00         | 100%            | 0   | 1/12/2022  |
| 8                                                 | -          | Mark Farmer       | Jasik Household       | Shanna Jasik Donation 01/17/2022 Annual Campaign - Direct Mail | Closed Won | Q1-2022       | \$250.00    | \$250.00         | 100%            | 0   | 1/17/2022  |
| 9                                                 | -          | Mark Farmer       | Dulanty Household     | Jodi Dulanty Donation 01/19/2022 Annual Campaign - Email       | Closed Won | Q1-2022       | \$75.00     | \$75.00          | 100%            | 0   | 1/19/2022  |
| 10                                                | -          | Mark Farmer       | Rentell Household     | Karly Rentell Donation 02/01/2022 Annual Campaign - Email      | Closed Won | Q1-2022       | \$50.00     | \$50.00          | 100%            | 0   | 2/1/2022   |

## Grouped Reports

As a first step - COACH wants to view the types of contributed revenue they are receiving and what campaigns they are connected to. They consider their membership fees to be earned revenue, so they will need to remove those from their fundraising report.

1. Click **Edit**.
2. In the Outline, find and select **Opportunity Record Type** in the **Add group...** field under Group Rows.
3. Find and select **Primary Campaign Source** in the **Add group...** field under Group Rows
4. In the preview pane, click the dropdown for the Amount field.
  - a. Select Summarize > Sum
  - b. Repeat and select Average

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5. Click into the **Add filter...** field to find and select **Opportunity Record Type**.
6. Change the *Operator* to **not equal to**, and select **Membership**
7. Click **Apply**.
8. Click **Run** to see our results
9. Toggle **"Detail Rows"** off to see only the summary data
10. Toggle **"Detail Rows"** on to see the details of the records in each group

| Report: Opportunities<br><b>New Opportunities Report</b> |                               |                |                |              |  |
|----------------------------------------------------------|-------------------------------|----------------|----------------|--------------|--|
| Total Records                                            | Total Amount                  | Average Amount |                |              |  |
| 63                                                       | \$262,285.00                  | \$4,163.25     |                |              |  |
| <input type="checkbox"/> Opportunity Record Type ↑ ▾     | Primary Campaign Source ↑ ▾   | Sum of Amount  | Average Amount | Record Count |  |
| <input type="checkbox"/> Donation                        | -                             | \$11,500.00    | \$638.89       | 18           |  |
|                                                          | Annual Campaign - Direct Mail | \$1,800.00     | \$105.88       | 17           |  |
|                                                          | Annual Campaign - Email       | \$1,485.00     | \$114.23       | 13           |  |
|                                                          | Volunteer Fundraiser          | \$2,500.00     | \$625.00       | 4            |  |
|                                                          | Subtotal                      | \$17,285.00    | \$332.40       | 52           |  |
| <input type="checkbox"/> Grant                           | -                             | \$10,000.00    | \$10,000.00    | 1            |  |
|                                                          | Subtotal                      | \$10,000.00    | \$10,000.00    | 1            |  |
| <input type="checkbox"/> Major Gift                      | Major Gifts                   | \$235,000.00   | \$23,500.00    | 10           |  |
|                                                          | Subtotal                      | \$235,000.00   | \$23,500.00    | 10           |  |
| <b>Total</b>                                             |                               | \$262,285.00   | \$4,163.25     | 63           |  |

*Think Like an Admin Tip:* You can use a Blank [ ] filter value in your filters to find records with an empty field or *any* value in a field. This can also help you to find records that need to be updated - In the screenshot above, there are a number of opportunities with no campaign listed. If you want to find all of the Opportunity records without a Campaign, you can use a filter for

"Primary Campaign Source | equals | {blank}"

Filter by Primary Campaign Source

Operator

equals ▾

☐ Locked ⓘ

Cancel

Apply

Finished - this is a valid filter!

Primary Campaign Source

equals ""

### Matrix Reports

This is interesting, but it would be helpful to see how this has changed over time. So we'll add in a grouping for the Close Date, and set the grouping by month

1. Click **Edit**.
2. In the Outline, find and select **Close Date** in the **Add column...** field under Group Columns
3. In the preview pane, click the dropdown for the Close Date field.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

- a. Select Group Date By > Calendar Month
4. Click **Run** to see our results
5. Then **Save** the report if you'd like
6. To see the details of a particular segment, just click it. The cell will highlight, and the results below will show the records in that segment (if Detail Rows is toggled off, you'll need to toggle it on to see the details)

|  Report: Opportunities<br><b>New Opportunities Report</b> |                               |                |           |              |            |             |                |               |              |
|--------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|----------------|-----------|--------------|------------|-------------|----------------|---------------|--------------|
| Total Records                                                                                                                              | Total Amount                  | Average Amount |           |              |            |             |                |               |              |
| 63                                                                                                                                         | \$262,285.00                  | \$4,163.25     |           |              |            |             |                |               |              |
| Opportunity Record Type ▼                                                                                                                  | Primary Campaign Source ▼     | Close Date → ▼ | July 2020 | January 2021 | April 2021 | August 2021 | September 2021 | November 2021 | January 2022 |
| <input type="checkbox"/> Donation                                                                                                          | -                             | Sum of Amount  | \$0.00    | \$0.00       | \$0.00     | \$10,500.00 | \$1,000.00     | \$0.00        | \$0.00       |
|                                                                                                                                            |                               | Average Amount | \$0.00    | \$0.00       | \$0.00     | \$807.69    | \$200.00       | \$0.00        | \$0.00       |
|                                                                                                                                            |                               | Record Count   | 0         | 0            | 0          | 13          | 5              | 0             | 0            |
|                                                                                                                                            | Annual Campaign - Direct Mail | Sum of Amount  | \$100.00  | \$0.00       | \$0.00     | \$0.00      | \$0.00         | \$0.00        | \$350.00     |
|                                                                                                                                            |                               | Average Amount | \$100.00  | \$0.00       | \$0.00     | \$0.00      | \$0.00         | \$0.00        | \$175.00     |
|                                                                                                                                            |                               | Record Count   | 1         | 0            | 0          | 0           | 0              | 0             | 2            |
|                                                                                                                                            | Annual Campaign - Email       | Sum of Amount  | \$0.00    | \$0.00       | \$0.00     | \$150.00    | \$0.00         | \$0.00        | \$75.00      |
|                                                                                                                                            |                               | Average Amount | \$0.00    | \$0.00       | \$0.00     | \$150.00    | \$0.00         | \$0.00        | \$75.00      |
|                                                                                                                                            |                               | Record Count   | 0         | 0            | 0          | 1           | 0              | 0             | 1            |
|                                                                                                                                            | Volunteer Fundraiser          | Sum of Amount  | \$0.00    | \$0.00       | \$0.00     | \$0.00      | \$0.00         | \$0.00        | \$0.00       |
|                                                                                                                                            |                               | Average Amount | \$0.00    | \$0.00       | \$0.00     | \$0.00      | \$0.00         | \$0.00        | \$0.00       |
|                                                                                                                                            |                               | Record Count   | 0         | 0            | 0          | 0           | 0              | 0             | 0            |
|                                                                                                                                            | Subtotal                      | Sum of Amount  | \$100.00  | \$0.00       | \$0.00     | \$10,650.00 | \$1,000.00     | \$0.00        | \$425.00     |
|                                                                                                                                            |                               | Average Amount | \$100.00  | \$0.00       | \$0.00     | \$760.71    | \$200.00       | \$0.00        | \$141.67     |
|                                                                                                                                            |                               | Record Count   | 1         | 0            | 0          | 14          | 5              | 0             | 3            |

## Dashboards

### VIEW AN NPSP DASHBOARD

Executive directors and development officers want to keep up with fundraising efforts at their nonprofit. To help, NPSP comes with four pre-configured dashboards that you can use as-is or customize to your needs.

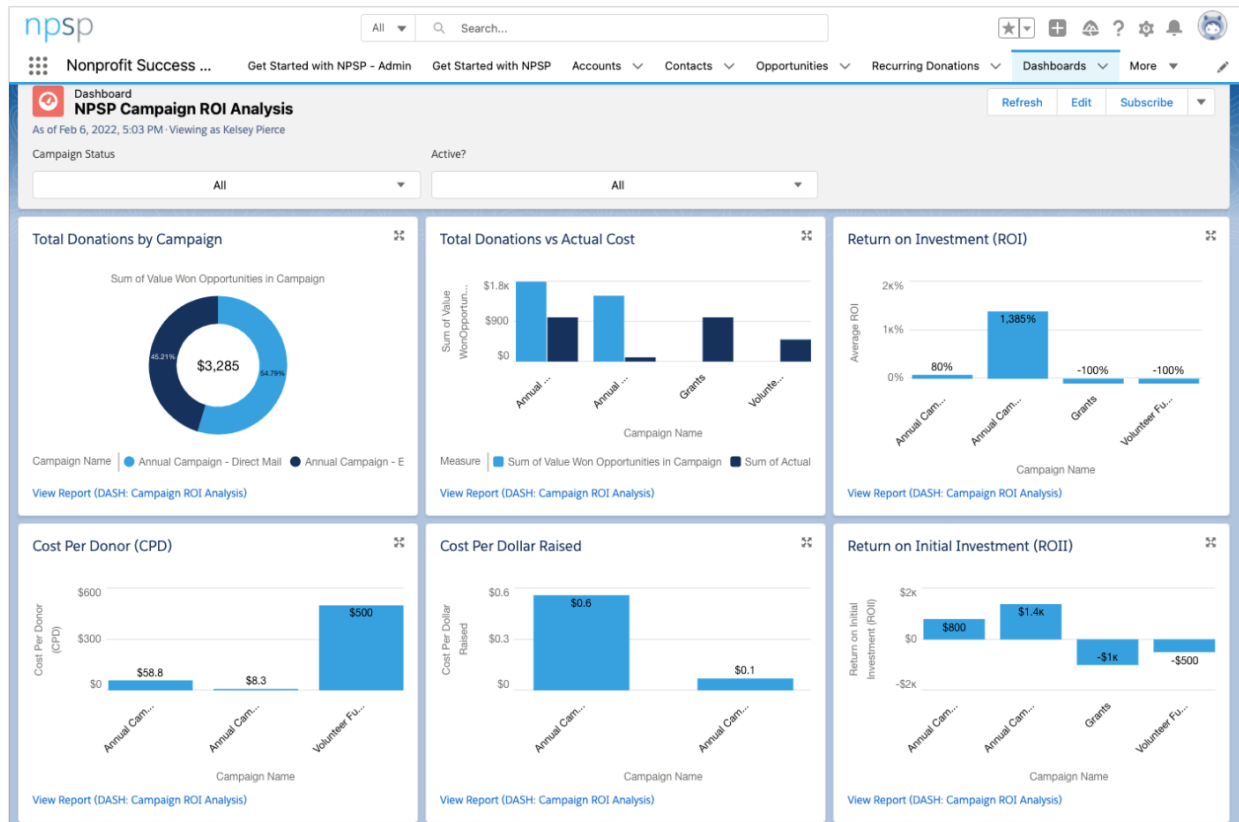
Since we've been working with campaigns in this workshop, we'll take a look at a campaign analysis dashboard.

1. Click the **Dashboards** tab.
2. Click **All Folders**.
3. Select **NPSP Dashboards**. Notice you have folders for Company Dashboards and Program Management Dashboards that you can check out at another time.
4. Select the **NPSP Campaign ROI Analysis** dashboard.
5. This dashboard is made up of nine components, each drawn from an underlying report. In this case, all of the dashboard components display different views of data from the same report—DASH: Campaign ROI Analysis—but you can pull multiple reports into the same dashboard.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

Dashboard components can display data in a number of different formats—bar graphs, donut charts, line charts, metrics, funnels, gauges, and tables.

*Think Like an Admin Tip:* We can view the underlying report of any dashboard component by clicking on the report link. Be aware that users will only see report data that they have access to through their personal Salesforce security settings, even if they can see high-level summaries in a dashboard.



At the top of the dashboard, we see two dashboard filters. Click the **Campaign Status** filter and select **Completed**. Now we can study an overview of our past fundraising campaigns.

*Think Like an Admin Tip:* You can include up to 20 components and up to three filters on each dashboard.

### SUBSCRIBE TO A DASHBOARD

1. To regularly get an email copy of a dashboard, click the **Subscribe** button.
2. Set the time each week you'd like to receive it. For now, choose:
  - a. Frequency: **Weekly**
  - b. Days: **Monday**
  - c. Time: **9:00 AM**
3. Click **Save**.

Now, even if you don't go directly to the dashboard, it will come directly to you. You can also subscribe to reports in the same way.

## Salesforce for Nonprofits Base Camp: Creating Reports and Dashboards

Now it's time for you to explore reports and dashboards on your own. What questions would you like to answer using your data?

### ***Think Like an Admin Tip Resources***

- [Trailhead: Campaign Management with Nonprofit Success Pack](#)
- [Trailhead: Reports and Dashboards with Nonprofit Success Pack](#)
- [Trailhead: Data Security](#)
- [Download: NPSP Reports Workbook](#)
- [Documentation: Deluxe Custom Reports](#)
- [Documentation: How to Manage Reports - A Guide for Admins](#)