

Salesforce Report 'Recipes' for Donor/Member Retention



RILWP Workshop June 2, 2009



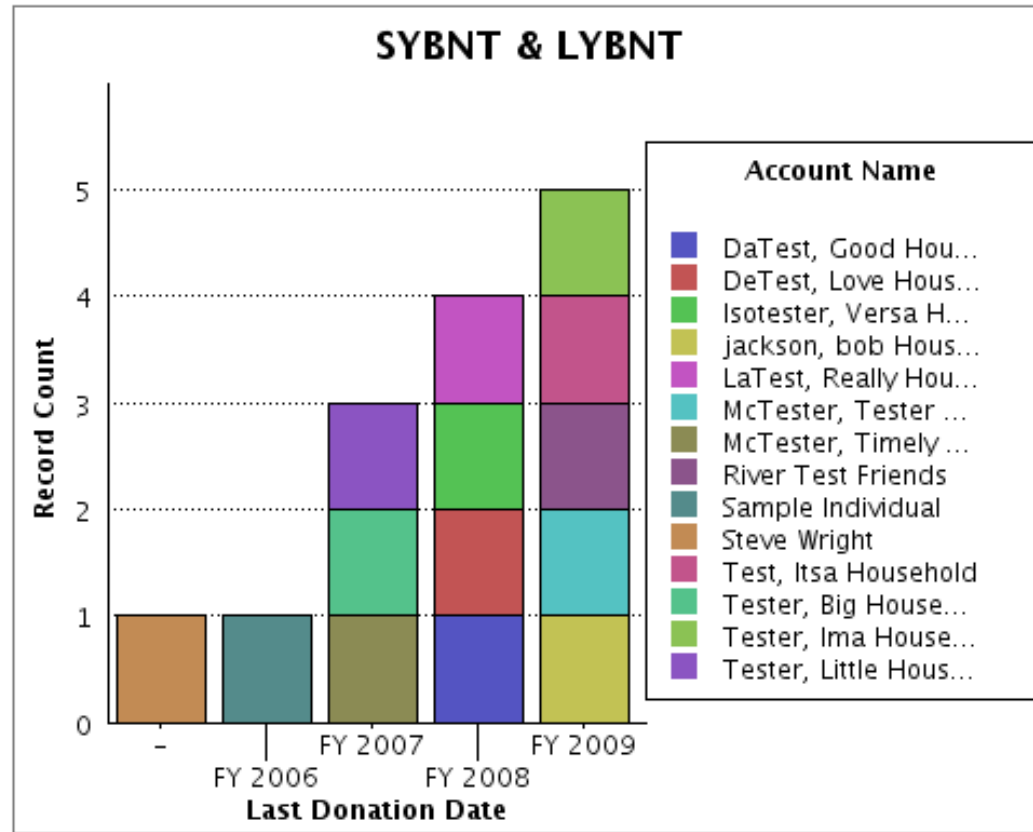
Salesforce Report 'Recipes'

② 'LYBUNT' & 'SYBUNT' for Past 2 Years

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LYBNT & SYBNT



This graph includes LYBNT (Last Year But Not This), SYBNT (Some Year But Not This) and CY (Current Year) comparative counts for donations. This graph does not include grants.

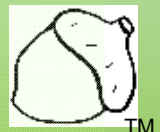
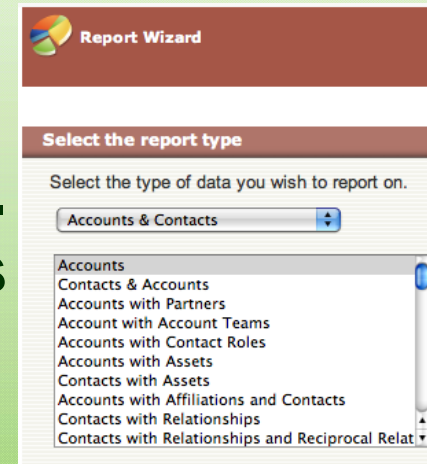


② LYBNT & SYBNT

These instructions will be more abbreviated under the assumption you have created the previous series of reports. Also, note that this report used in the workshop used a small database – you may find that it will not work in a larger database.

A LYBNT & SYBNT report is now included in the new template, you may want to try it first. Finally, a second recipe variation will be provided in an additional Powerpoint.

Start by creating a new custom report. In the Report Wizard, select 'Accounts & Contacts' and 'Accounts'.



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Step 2: Select the grouping for which you would like to calculate summary information

Select columns by which to group your report.

1. Specify your Row Headings:

Select the fields that will be used as the summary rows in your matrix report.

	Subtotal By	Sort Order	Group Dates By
	Account Name	Ascending	Day
	and then by	Sort Order	Group Dates By
	--None--	Ascending	Day

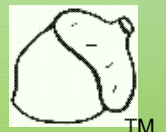
2. Specify your Column Headings:

Select the fields that will be used as the summary columns in your matrix report.

	Subtotal By	Sort Order	Group Dates By
	Last Donation Date	Ascending	Fiscal Year
	and then by	Sort Order	Group Dates By
	--None--	Ascending	Day

Step 1 - Select Matrix report. Next.

Step 2 – Set Row Headings to subtotal by ‘Account Name’. Set Column Headings to subtotal by ‘Last Donation Date’ in ‘Ascending’ order, grouping dates by ‘Fiscal Year’. Next.



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Standard Summary Fields	
Columns	Sum
Record Count	<input checked="" type="checkbox"/>

Step 3 - Sum by 'Record Count'. Next.



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Step 4: Select the report columns

Select the columns to include in your report.

[Select All Columns](#) | [Deselect All Columns](#)

Account General				Select All Deselect All
<input type="checkbox"/> Account Owner	<input type="checkbox"/> Account Owner Alias	<input type="checkbox"/> Created By	<input type="checkbox"/> Created Alias	
<input type="checkbox"/> Last Modified By	<input type="checkbox"/> Last Modified Alias	<input checked="" type="checkbox"/> Account Name	<input type="checkbox"/> Account Site	
<input type="checkbox"/> Annual Revenue	<input type="checkbox"/> Type	<input type="checkbox"/> Account Record Type	<input type="checkbox"/> Ticker Symbol	
<input type="checkbox"/> Rating	<input type="checkbox"/> Industry	<input type="checkbox"/> SIC Code	<input type="checkbox"/> Ownership	
<input type="checkbox"/> Account Number	<input type="checkbox"/> Employees	<input type="checkbox"/> Last Activity	<input type="checkbox"/> Parent Account	
<input type="checkbox"/> Parent Account ID	<input type="checkbox"/> Parent Account Site	<input type="checkbox"/> Description	<input type="checkbox"/> Created Date	
<input type="checkbox"/> Last Modified Date	<input type="checkbox"/> Account ID	<input type="checkbox"/> Owner Role	<input type="checkbox"/> Self-Service Enabled	
<input type="checkbox"/> Self-Service Last Login Date				

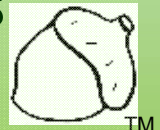
Account: Address				Select All Deselect All
<input checked="" type="checkbox"/> Primary Street	<input type="checkbox"/> Primary Address Line 1	<input type="checkbox"/> Primary Address Line 2	<input type="checkbox"/> Primary Address Line 3	
<input checked="" type="checkbox"/> Primary City	<input checked="" type="checkbox"/> Primary State/Province	<input checked="" type="checkbox"/> Primary Zip/Postal Code	<input type="checkbox"/> Primary Country	
<input type="checkbox"/> Secondary Street	<input type="checkbox"/> Secondary Address Line 1	<input type="checkbox"/> Secondary Address Line 2	<input type="checkbox"/> Secondary Address Line 3	
<input type="checkbox"/> Secondary City	<input type="checkbox"/> Secondary State/Province	<input type="checkbox"/> Secondary Zip/Postal Code	<input type="checkbox"/> Secondary Country	

Account: Ph/Fax/URL			Select All Deselect All
<input type="checkbox"/> Phone	<input type="checkbox"/> Fax	<input type="checkbox"/> Website	

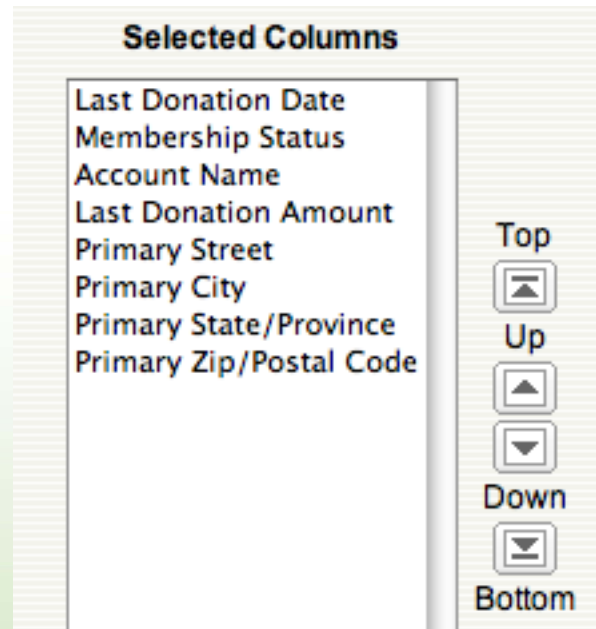
Account: Custom Info				Select All Deselect All
<input type="checkbox"/> _SYSTEM: IsIndividual	<input type="checkbox"/> _SYSTEM: One2OneContact	<input type="checkbox"/> Addressee	<input type="checkbox"/> Addressee-Informal	
<input type="checkbox"/> Amount of Time Since Initial Membership	<input type="checkbox"/> Current Membership End Date	<input type="checkbox"/> Current Membership Start Date	<input type="checkbox"/> First Donation Date	
<input type="checkbox"/> Highest Donation Amount	<input type="checkbox"/> Household Type	<input type="checkbox"/> Initial Membership Start Date	<input checked="" type="checkbox"/> Last Donation Amount	
<input checked="" type="checkbox"/> Last Donation Date	<input type="checkbox"/> Lifetime Donation History (Amount)	<input type="checkbox"/> Lifetime Donation History (Number)	<input checked="" type="checkbox"/> Membership Status	
<input type="checkbox"/> Organization Type				

[Run Report](#) [Export Details](#) [Printable View](#) [Save](#) [Save As](#) [Delete](#)

Step 4 – Deselect All Columns. Select: ‘Account Name’, ‘Last Donation Date’, ‘Last Donation Amount’ and ‘Membership Status’. In this example, address fields were also selected for the report. Next.



② LYBNT & SYBNT



**Step 5 – Organize the columns in the order shown.
Next.**



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Step 6: Select your report criteria

Select criteria to determine which records display.

Standard Filters

View: Columns: Duration:

Start Date: End Date:

Advanced Filters

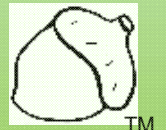
Field	Operator	Value	
<input type="text" value="--None--"/>	<input type="text" value="equals"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="equals"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="equals"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="equals"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="equals"/>	<input type="text"/>	

[Advanced Options...](#)

Advanced Settings

Show report details

Step 6 – Set the View to ‘All Accounts’, Columns to ‘Last Donation Date’ and Duration to ‘Custom’ while leaving the dates blank. These dates can be adjusted in future versions of the report to create exclusive LYBNT, SYBNT and any other desired time ranges. Next.



LYBNT & SYBNT

Step 7: Select the Chart Type and Report Highlights

Select the type of chart and additional charting options.

Chart Settings

Chart Type

Vertical Column - Stacked [View Chart Types](#)

Y-Axis

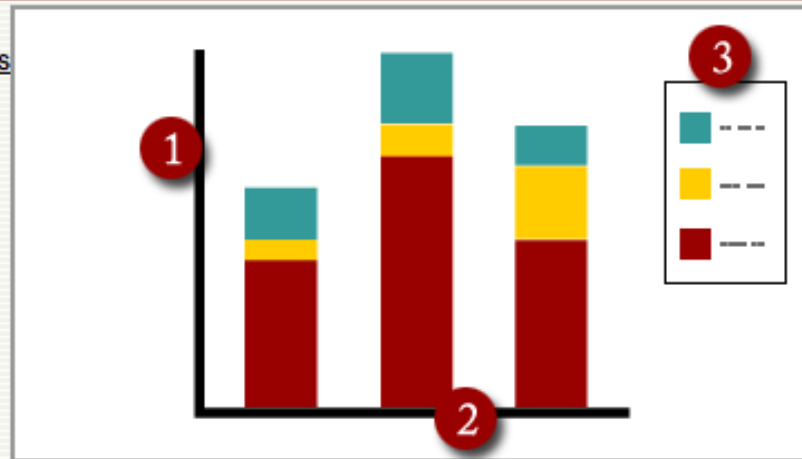
Record Count **1**

X-Axis

Last Donation Date **2**

Groupings

Account Name **3**



Step 7, set Chart Type to ‘Vertical Column – Stacked’, Y-Axis to ‘Record Count’, X-Axis to ‘Last Donation Date’ and Groupings to ‘Account Name’.



LYBNT & SYBNT

Chart Colors and Presentation

Size: Medium | Location: Bottom of Report

Title Color: [Black] | Title Size: 18 pt. | Chart Title: SYBNT & LYBNT

Text Color: [Black] | Text Size: 12 pt.

Background Fade: Diagonal | from [] to []

Legend Position: Right

Y-Axis Range: Automatic

Show Axis Labels

Step 7 Cont'd.- In the Chart Colors and Presentations section, the chart size was set to 'Medium' and the box 'Show Axis Labels' checked. All other fields were the default selections. Be sure to input a new, unique Chart Title. Run Report.

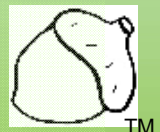


LYBNT & SYBNT

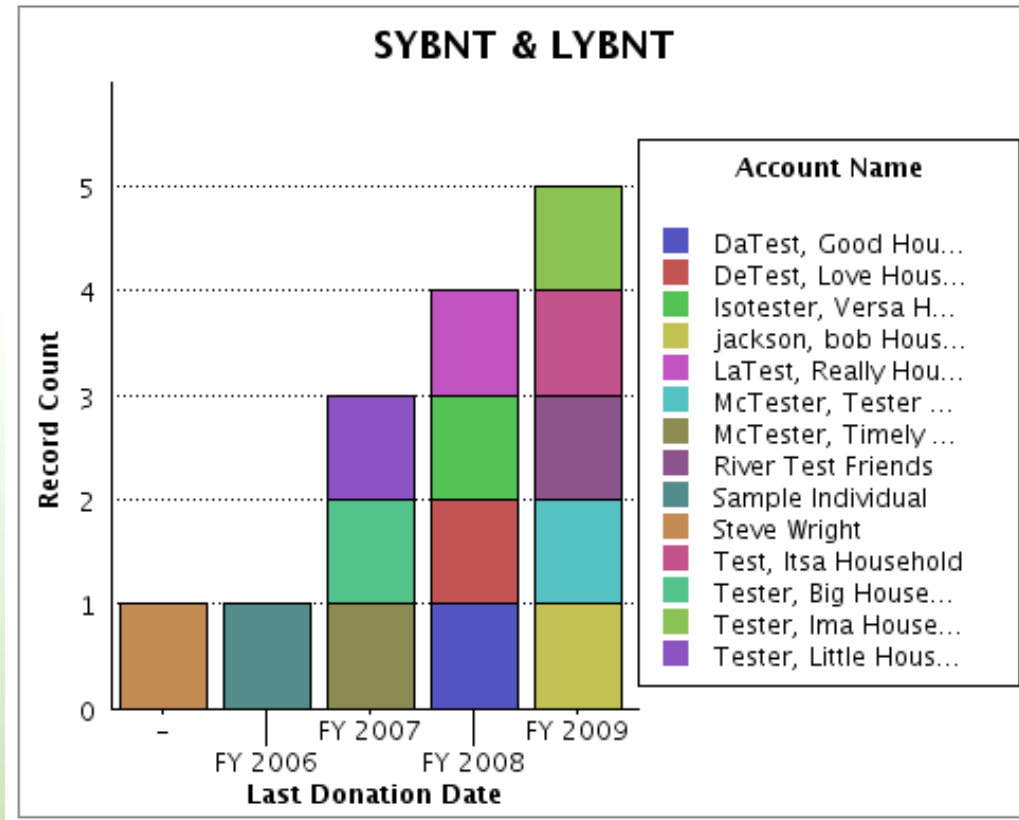
Generated Report:

	Account Name	Record Count	Last Donation Date				Grand Total	Membership Status	Last Donation Amount	Primary Street
			-	FY 2006	FY 2007	FY 2008				
<input type="checkbox"/>	<u>DaTest, Good Household</u>	0	0	0	1	0	1			
					1			Expired	\$75.00	15 Long Rd
<input type="checkbox"/>	<u>DeTest, Love Household</u>	0	0	0	1	0	1			
					1			Expired	\$35.00	15 Little Rd.
<input type="checkbox"/>	<u>Isotester, Versa Household</u>	0	0	0	1	0	1			
					1			Expired	\$35.00	15 Little Rd.

The Generated report sums up the last donation date count by fiscal year by account. The other columns provide additional information beyond that needed for the chart to demonstrate that variations of this report including contact name and address could be used to create mail merge fields for targeted solicitation's for donor member retention campaigns.



LYBNT & SYBNT



Additional adjustments to this report can improve the chart. The data can also be exported to Excel which has a broader range of chart types and chart features. Be sure to save the report with a unique name.

