

Salesforce Report 'Recipes' for Donor/Member Retention



RILWP Workshop June 2, 2009

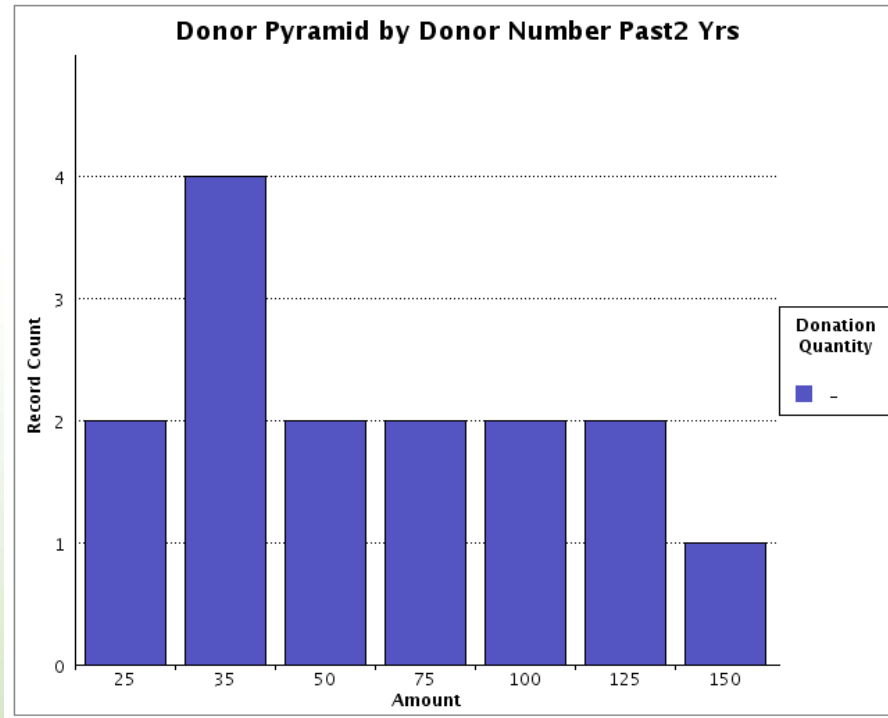


Salesforce Report 'Recipes'

- ① **'Donor Pyramids' for Past 2 Years**
Pyramids by Donation Count



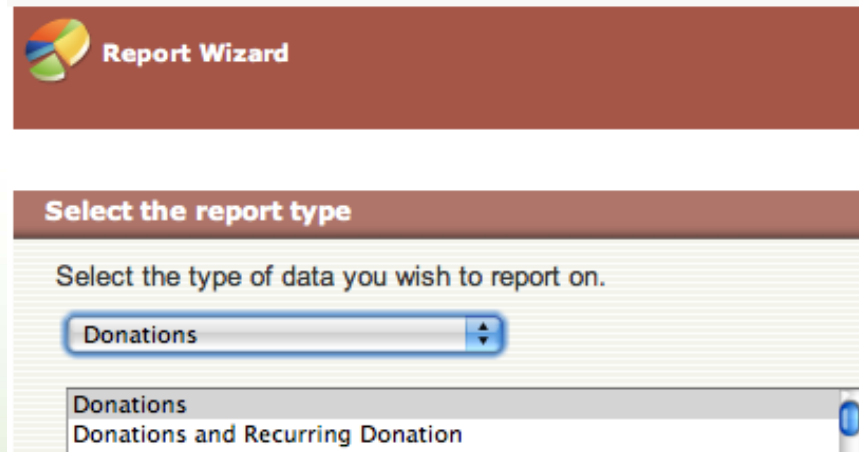
① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



This basic donor pyramid for two years sorts donations to show your organization's distribution by gift amount. Grants are not included in this pyramid.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



In the Reports tab, click the 'Create New Custom Report' button.

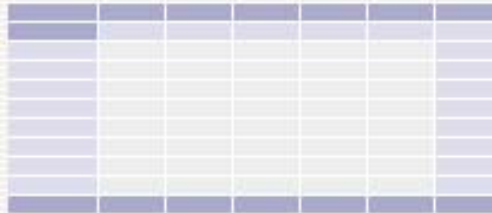
In the Report Wizard, select the Donations report type and Donations from the picklist. Click 'Next' button.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 1: Select the report format

Matrix Report



| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
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| | | | | | | | | | |

Matrix reports list summaries of your data in a grid against both horizontal and vertical criteria.

Cancel

Next

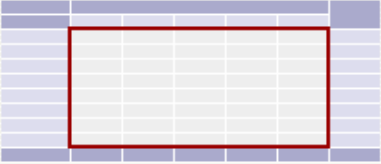
In Step 1, select the Matrix Report format and click Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 3: Select the information to summarize

Select the summary information and summary type.



Standard Summary Fields

| Columns | Sum |
|-------------------|-------------------------------------|
| Record Count | <input type="checkbox"/> |
| Amount | <input checked="" type="checkbox"/> |
| Donation Quantity | <input checked="" type="checkbox"/> |
| Expected Revenue | <input type="checkbox"/> |

Step 3, Select Columns to Total, check 'Amount' and 'Donation Quantity'. Click Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 4: Select the report columns

Select the columns to include in your report.

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

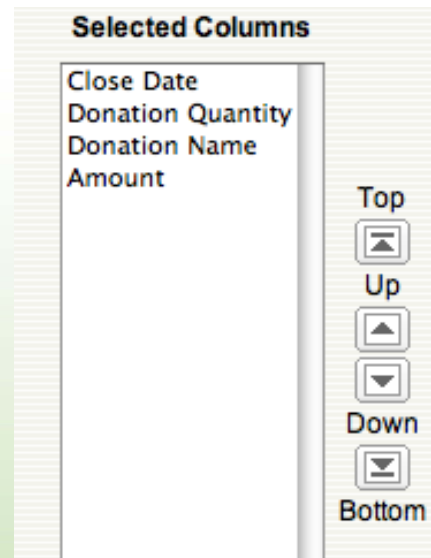
| Donation Information | | | Select All Deselect All |
|---|---|--|---|
| <input type="checkbox"/> Donation Owner | <input type="checkbox"/> Donation Owner Alias | <input type="checkbox"/> Donation Owner Email | <input type="checkbox"/> Donation Owner: Phone |
| <input type="checkbox"/> Donation Owner: Mobile Phone | <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"/> Donation Name | <input type="checkbox"/> Type | <input type="checkbox"/> Donation Record Type |
| <input type="checkbox"/> Lead Source | <input type="checkbox"/> Primary Partner | <input checked="" type="checkbox"/> Amount | <input checked="" type="checkbox"/> Donation Quantity |
| <input type="checkbox"/> Expected Revenue | <input type="checkbox"/> Closed | <input type="checkbox"/> Won | <input checked="" type="checkbox"/> Close Date |
| <input type="checkbox"/> Close Date (2) | <input type="checkbox"/> Close Month | <input type="checkbox"/> Next Step | <input type="checkbox"/> Stage |
| <input type="checkbox"/> Probability (%) | <input type="checkbox"/> Fiscal Period | <input type="checkbox"/> Fiscal Year | <input type="checkbox"/> Age |
| <input type="checkbox"/> Stage Duration | <input type="checkbox"/> Forecast Category | <input type="checkbox"/> Owner Role | <input type="checkbox"/> Donation ID |
| <input type="checkbox"/> Last Activity | <input type="checkbox"/> Description | <input type="checkbox"/> Has Products | <input type="checkbox"/> Created Date |
| <input type="checkbox"/> Last Modified Date | <input type="checkbox"/> Private | <input type="checkbox"/> Primary Campaign Source | |

In Step 4, Select Columns, first click over 'Deselect All Columns'. Check the four fields shown: 'Donation Name', 'Amount', 'Donation Quantity' & 'Close Date'. Click Next .



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 5: Order the report columns



In Step 5, Order Columns, use the arrow buttons to arrange the Selected Columns in the order shown. Click Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 6, Select Criteria, set Interval to 'Close Date', Duration to 'Previous 2 CY', View to 'All Donations' and Donation Status to 'Closed Won'. Leave Probability at 'All'. Start Date and End Date will self populate. Advanced Filters are left blank. For Advanced Settings, check the Show Report Options Box. Click Next.

Step 6: Select your report criteria

Select criteria to determine which records display.

Standard Filters

Interval: Duration:

Start Date: End Date:

View: Donation Status: Probability:

Advanced Filters

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

[Advanced Options...](#)

Advanced Settings

Show report details



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 7: Select the Chart Type and Report Highlights

Select the type of chart and additional charting options.

Chart Settings

Chart Type

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

Y-Axis

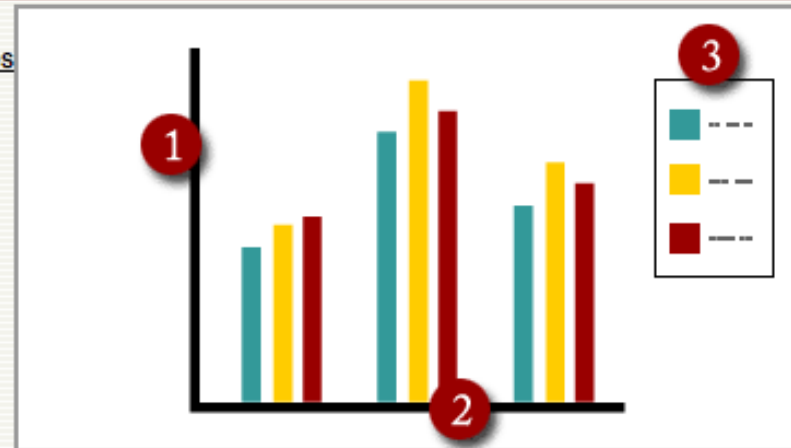
Record Count ①

X-Axis

Amount ②

Groupings

Donation Quantity ③



Step 7, Select Chart and Highlights, Chart Settings include: Chart Type as 'Vertical Column - Grouped, Y-Axis as 'Record Count', X-Axis as 'Amount' and Groupings as 'Donation Quantity'.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Chart Colors and Presentation

Size: Large | Location: Bottom of Report

Title Color: [Black] | Title Size: 18 pt. | Chart Title: Donor Pyramid by Donor Number Past2 Yrs

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 'Large', a Chart Title was input as shown and the box checked for 'Show Axis Labels'. Other fields are the default selections.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

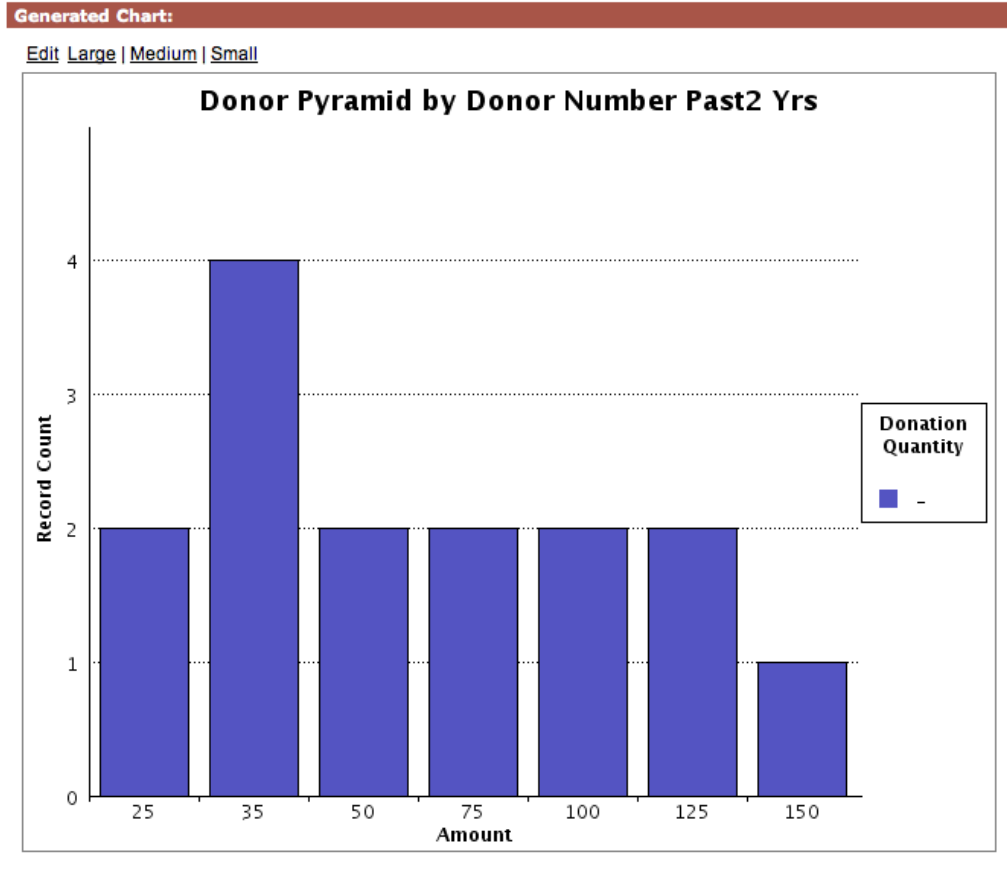
Generated Report:

| Donation Quantity | | Amount | | | | | | | Grand Total | Close Date |
|--|--------------------------|---------|----------|----------|----------|----------|----------|----------|-------------|------------|
| | | \$25.00 | \$35.00 | \$50.00 | \$75.00 | \$100.00 | \$125.00 | \$150.00 | | |
| <input type="checkbox"/> - | Sum of Donation Quantity | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Sum of Amount | \$50.00 | \$140.00 | \$100.00 | \$150.00 | \$200.00 | \$250.00 | \$150.00 | \$1,040.00 | |
| <u>DaTest, Good Household Donation - 5/23/2007</u> | Donation Quantity | - | | | | | | | | 5/23/2007 |
| | Amount | \$25.00 | | | | | | | | |
| <u>Test, Ilsa Household- Donation 5/23/2008</u> | Donation Quantity | - | | | | | | | | 5/23/2008 |
| | Amount | \$25.00 | | | | | | | | |
| <u>Isotester, Versa Household Membership - 5/23/2007</u> | Donation Quantity | | - | | | | | | | 5/23/2007 |
| | Amount | | \$35.00 | | | | | | | |
| <u>Tester, Little Household Membership - 5/23/2007</u> | Donation Quantity | | - | | | | | | | 5/23/2007 |
| | Amount | | \$35.00 | | | | | | | |
| <u>DeTest, Love Household Membership - 5/23/2008</u> | Donation Quantity | | - | | | | | | | 5/23/2008 |
| | Amount | | \$35.00 | | | | | | | |
| <u>Isotester, Versa Household- Donation 5/23/2008</u> | Donation Quantity | | - | | | | | | | 5/23/2008 |
| | Amount | | \$35.00 | | | | | | | |
| <u>Tester, Big Household Donation - 5/23/2007</u> | Donation Quantity | | | - | | | | | | 5/23/2007 |
| | Amount | | | \$50.00 | | | | | | |
| <u>DeTest, Love Household Donation - 5/23/2007</u> | Donation Quantity | | | - | | | | | | 5/23/2007 |
| | Amount | | | \$50.00 | | | | | | |
| <u>McTester, Tester Household Membership - 5/23/2007</u> | Donation Quantity | | | | - | | | | | 5/23/2007 |
| | Amount | | | | \$75.00 | | | | | |
| <u>DaTest, Good Household Membership - 5/23/2008</u> | Donation Quantity | | | | - | | | | | 5/23/2008 |
| | Amount | | | | \$75.00 | | | | | |
| <u>Tester, Ima Household- Donation 5/23/2007</u> | Donation Quantity | | | | | - | | | | 5/23/2007 |
| | Amount | | | | | \$100.00 | | | | |
| <u>Tester, Ima Household- Donation 5/23/2008</u> | Donation Quantity | | | | | - | | | | 5/23/2008 |
| | Amount | | | | | \$100.00 | | | | |
| <u>LaTest, Really Household Donation - 5/23/2007</u> | Donation Quantity | | | | | | - | | | 5/23/2007 |
| | Amount | | | | | | \$125.00 | | | |
| <u>LaTest, Really Household Membership - 5/23/2008</u> | Donation Quantity | | | | | | - | | | 5/23/2008 |
| | Amount | | | | | | \$125.00 | | | |
| <u>McTester, Timely Household Donation - 5/23/2007</u> | Donation Quantity | | | | | | | - | | 5/23/2007 |
| | Amount | | | | | | | \$150.00 | | |
| Grand Total | Sum of Donation Quantity | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Sum of Amount | \$50.00 | \$140.00 | \$100.00 | \$150.00 | \$200.00 | \$250.00 | \$150.00 | \$1,040.00 | |

The Generated Report is shown above for the sample database.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count




The Generated Chart is shown above.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Save Report

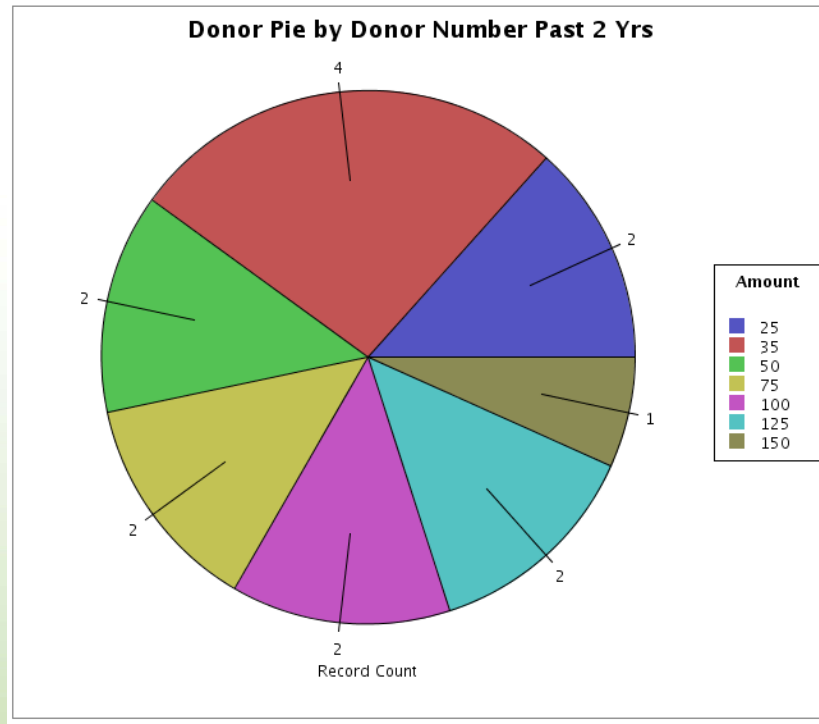
Your report is set to show data from the Hierarchy level of: ""
Check **Save Hierarchy Level** to save the report at this drill-down level.

| | |
|----------------------|---|
| Report Name | <input type="text" value="Donor Pyramid for Past Tw"/> |
| Report Description | <input type="text" value="Used in presentation - HHT"/> |
| Report Unique Name | <input type="text" value="Donor_Pyramid_for_Past_T"/>  |
| Namespace Prefix | |
| Report Folder | <input type="text" value="Unfiled Public Reports"/> |
| Save Hierarchy Level | <input type="checkbox"/> |

Click the Save button. Choose a Report Name and Report Description. Report Unique Name will be an automatically populated form of the report name. Choose an appropriate Report Folder. Click the 'Save & Return to Report' button to move on to the next pyramid option.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



Here is the same Donor Pyramid shown as a Donor Pie. Start from within the previous report.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Run Report ▾ Hide Details Customize Save Save As Delete Printable View Export Details

Step 7 of 7

Jump to Step Select Chart & Highlights ▾ Run Report

Step 7: Select the Chart Type and Report Highlights

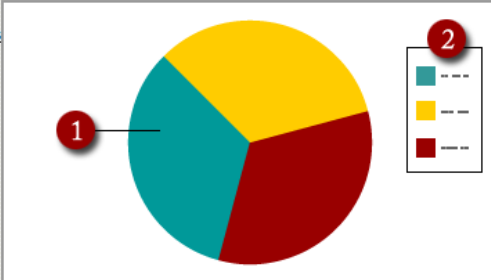
Select the type of chart and additional charting options.

Chart Settings

Chart Type
Pie ▾ View Chart Types

Values
Record Count ▾ ①

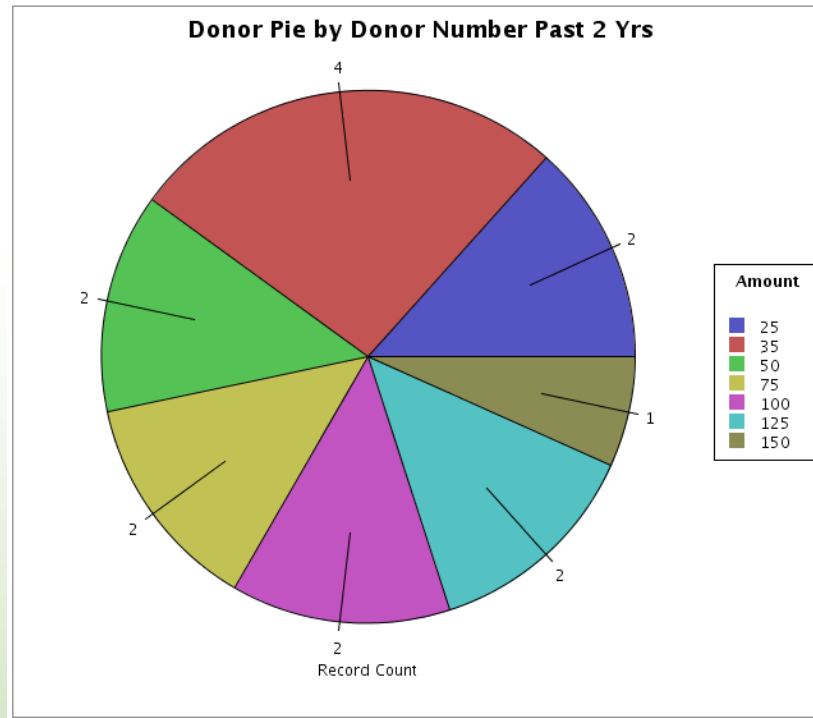
Wedges
Amount ▾ ②



Click the 'Customize' button. Then Jump to Step 7, Select Chart & Highlights. Change Chart Type to 'Pie'; Values and Wedges will automatically adjust to the values shown. Give the chart a new Title and Run Report.



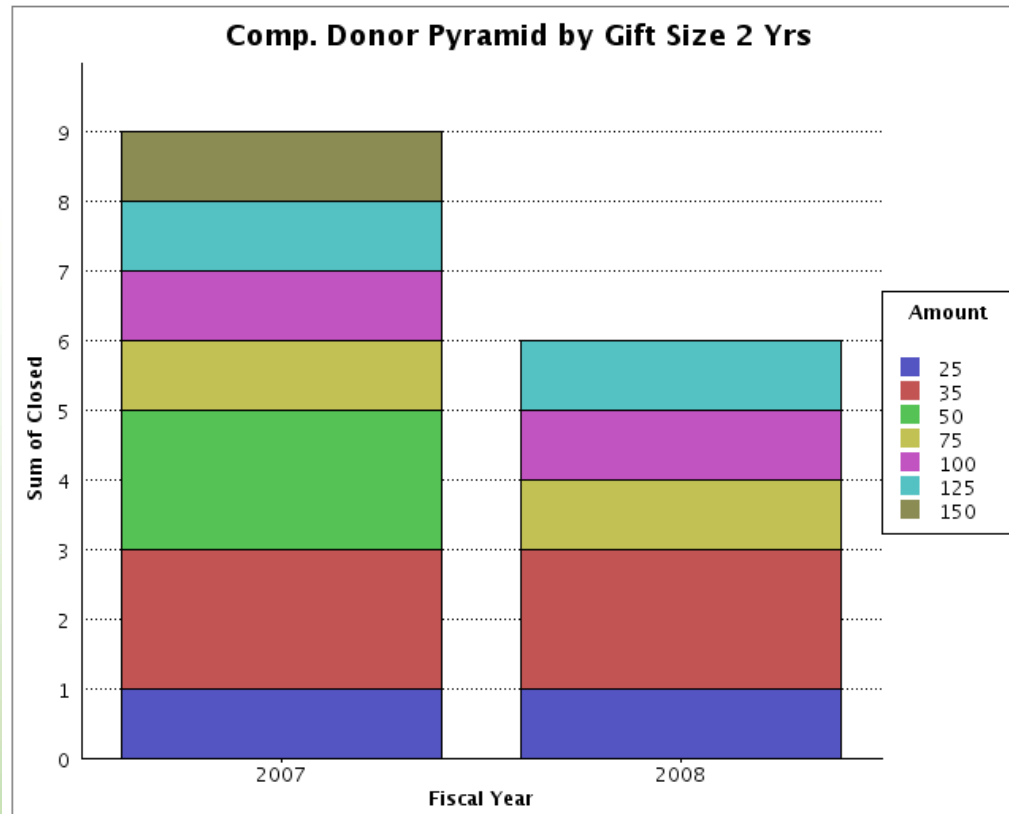
① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



The Generated Report will be the same, but the Generated Report will be the pie chart shown above. Save this report with a new name.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



Here is the fancy chart comparing the past two years as stacked Donor Pyramids.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

These instructions will be more abbreviated under the assumption you have created the two previous reports.

Start over creating a new Custom Report.

In the Report Wizard, choose the Donations report type and Donations selection in the pick list. Next.

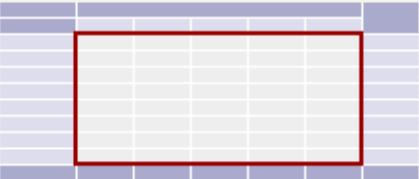
Step 1, choose Matrix report. Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 3: Select the information to summarize

Select the summary information and summary type.



Standard Summary Fields

| Columns | Sum |
|-------------------|-------------------------------------|
| Record Count | <input checked="" type="checkbox"/> |
| Amount | <input checked="" type="checkbox"/> |
| Donation Quantity | <input checked="" type="checkbox"/> |
| Expected Revenue | <input type="checkbox"/> |
| Closed | <input checked="" type="checkbox"/> |

**Step 3, Set these Columns to Sum:
Record Count, Amount, Donation Quantity
and Closed. Next.**



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 4: Select the report columns

Select the columns to include in your report.

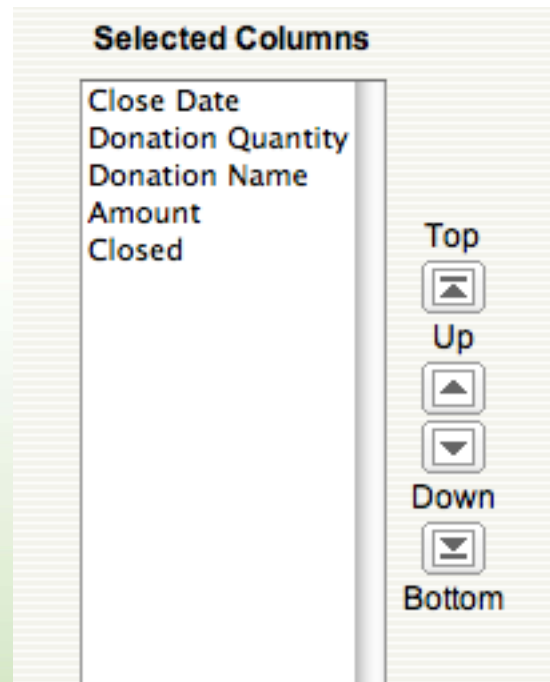
[Select All Columns](#) | [Deselect All Columns](#)

| Donation Information | | | | Select All | Deselect All |
|---|---|---|---|------------|--------------|
| <input type="checkbox"/> Donation Owner | <input type="checkbox"/> Donation Owner Alias | <input type="checkbox"/> Donation Owner Email | <input type="checkbox"/> Donation Owner: Phone | | |
| <input type="checkbox"/> Donation Owner: Mobile Phone | <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"/> Donation Name | <input type="checkbox"/> Type | <input type="checkbox"/> Donation Record Type | | |
| <input type="checkbox"/> Lead Source | <input type="checkbox"/> Primary Partner | <input checked="" type="checkbox"/> Amount | <input checked="" type="checkbox"/> Donation Quantity | | |
| <input type="checkbox"/> Expected Revenue | <input checked="" type="checkbox"/> Closed | <input type="checkbox"/> Won | <input checked="" type="checkbox"/> Close Date | | |
| <input type="checkbox"/> Close Date (?) | <input type="checkbox"/> Close Month | <input type="checkbox"/> Next Step | <input type="checkbox"/> Store | | |

Step 4: Deselect All Columns and then check: Donation Name, Closed, Amount, Donation Quantity and Close Date. Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



Step 5, arrange the Columns in the order shown. Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Step 6: Select your report criteria

Select criteria to determine which records display.

Standard Filters

Interval: Duration:

Start Date: End Date:

View: Donation Status: Probability:

Advanced Filters

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

[Advanced Options...](#)

Advanced Settings

Show report details

Step 6, set Interval to Close Date, Duration to Previous 2FY, View to All Donations, Donation Status to Closed Won. Check Show Report Details. Next.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

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
Sum of Closed ①

X-Axis
Fiscal Year ②

Groupings
Amount ③

Step 7, set Chart Type to Vertical Column – Stacked, Y-Axis to Sum of Closed, X-Axis to Fiscal Year and Groupings to Amount.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

Chart Colors and Presentation

Size: Large | Location: Bottom of Report

Title Color: [Black] | Title Size: 18 pt. | Chart Title: Comp. Donor Pyramid by Gift Size 2 Yrs

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

Background Fade: Diagonal | from [] to []

Legend Position: Right

Y-Axis Range: Automatic

Show Axis Labels

Step 7, choose a Large sized chart, give the chart a name and choose to Show the Axis Labels. Leave other fields at default settings. Run Report.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count

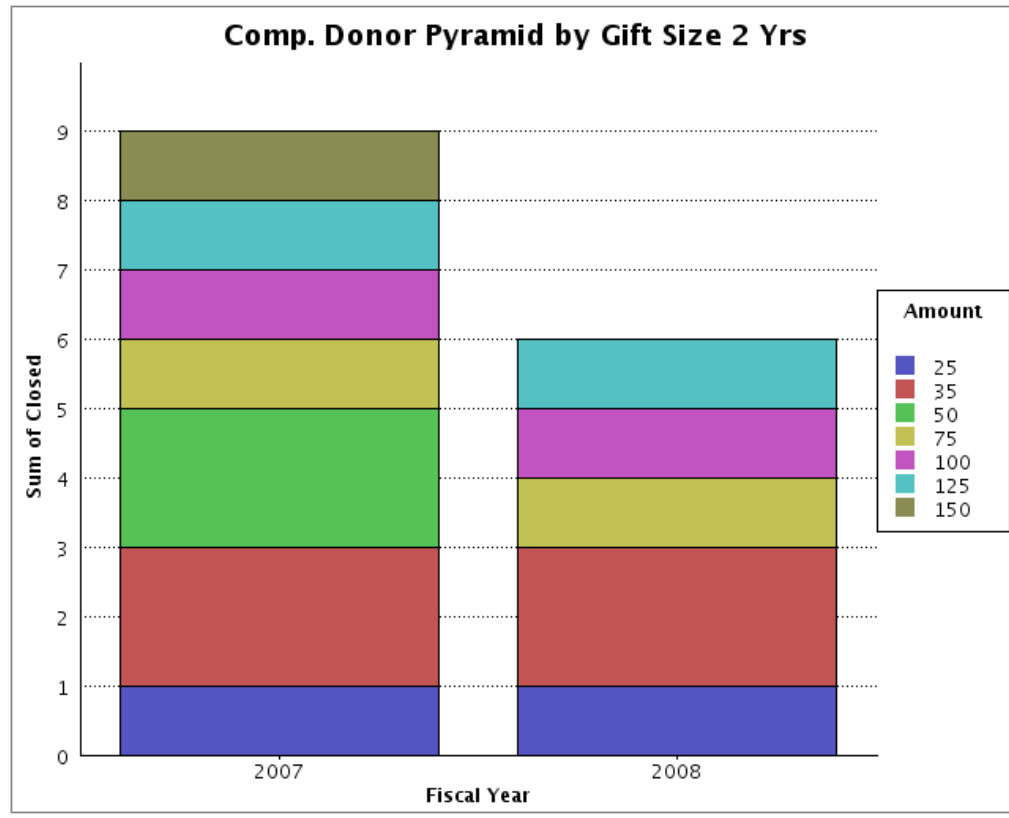
Generated Report:

| <u>Close Date</u> | <u>Donation Quantity</u> | <u>Donation Name</u> | <u>Closed</u> |
|--|--------------------------|--|---------------|
| <input type="checkbox"/> Fiscal Year: 2007 (9 records) | | | |
| | 0.00 | | 9 |
| Amount: \$25.00 (1 record) | | | |
| | 0.00 | | 1 |
| 5/23/2007 | - | <u>DaTest, Good Household Donation - 5/23/2007</u> | ✓ |
| Amount: \$35.00 (2 records) | | | |
| | 0.00 | | 2 |
| 5/23/2007 | - | <u>Isotester, Versa Household Membership - 5/23/2007</u> | ✓ |
| 5/23/2007 | - | <u>Tester, Little Household Membership - 5/23/2007</u> | ✓ |
| Amount: \$50.00 (2 records) | | | |
| | 0.00 | | 2 |
| 5/23/2007 | - | <u>Tester, Big Household Donation - 5/23/2007</u> | ✓ |
| 5/23/2007 | - | <u>DeTest, Love Household Donation - 5/23/2007</u> | ✓ |
| Amount: \$75.00 (1 record) | | | |
| | 0.00 | | 1 |
| 5/23/2007 | - | <u>McTester, Tester Household Membership - 5/23/2007</u> | ✓ |

The Generated Report will be a list of donations sorted by year and then amount. A partial view is shown here.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Count



**Here is the Generated Chart.
Save the report with a unique name in
an appropriate report folder.**



Salesforce Report 'Recipes'

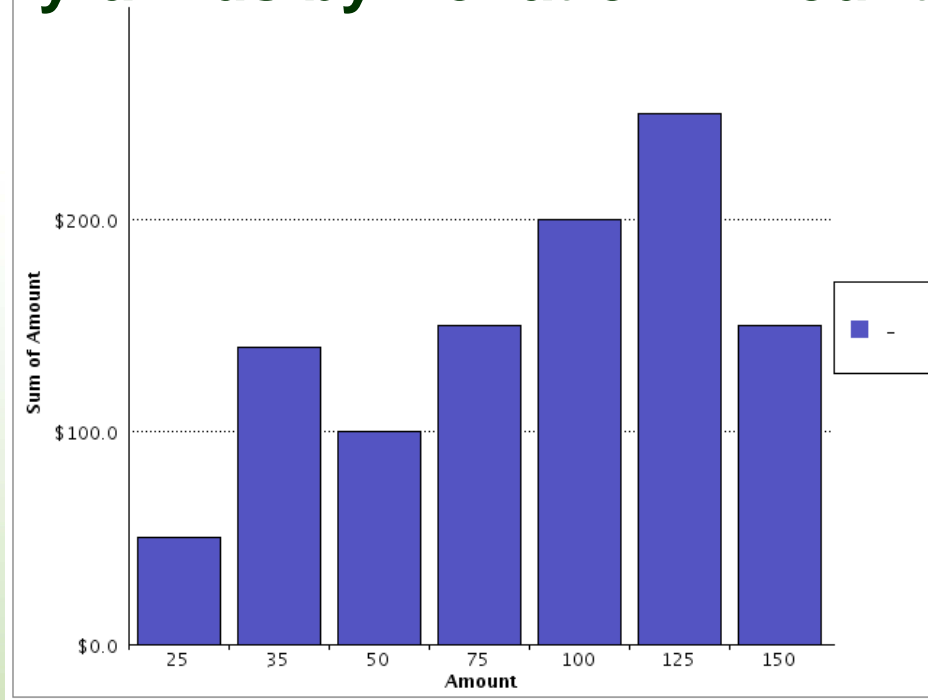
- ① **'Donor Pyramids' for Past 2 Years**
Pyramids by Donation Amount

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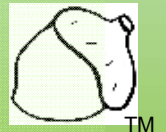


① 'Donor Pyramids' for Past 2 Years

Pyramids by Donation Amount



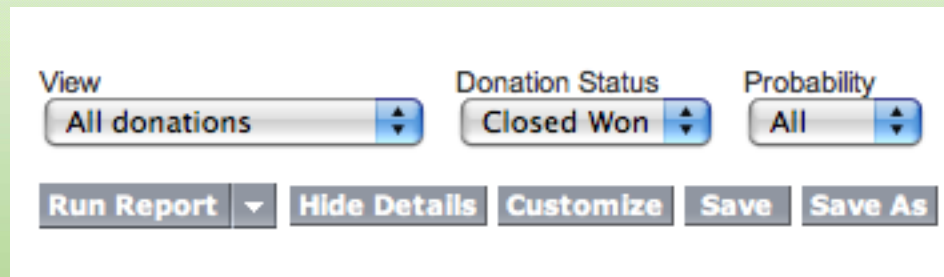
Rather than look at the donation count, this series of reports looks at the donation sum across a range of donation sizes.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount

These instructions will be more abbreviated under the assumption you have created the previous series of reports.

Save time by starting with the Pyramid by Donation Count, the first report. Run the first report and then select the 'Customize' button. The next screen will be Step 2.



The screenshot shows a report customization interface with three dropdown menus and five buttons. The dropdown menus are labeled 'View', 'Donation Status', and 'Probability'. The 'View' dropdown is set to 'All donations', 'Donation Status' is set to 'Closed Won', and 'Probability' is set to 'All'. Below the dropdowns are five buttons: 'Run Report' (with a dropdown arrow), 'Hide Details', 'Customize', 'Save', and 'Save As'.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount

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

Select columns by which to group your report.

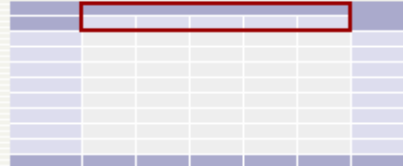
1. Specify your Row Headings:

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

| | | | |
|---|-------------------------|-------------------------|-----------------------|
|  | Subtotal By Amount | Sort Order Ascending | Group Dates By Day |
| | and then by --None-- | Sort Order Ascending | Group Dates By Day |

2. Specify your Column Headings:

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

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

Run Report Export Details Printable View Save Save As Delete

In Step 2, 'Select Reporting', choose to your Row Headings to subtotal by 'Amount'. Column Headings and other fields are left at default settings. Skip to Step 7.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount

Step 7: Select the Chart Type and Report Highlights

Select the type of chart and additional charting options.

Chart Settings

Chart Type

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

Y-Axis

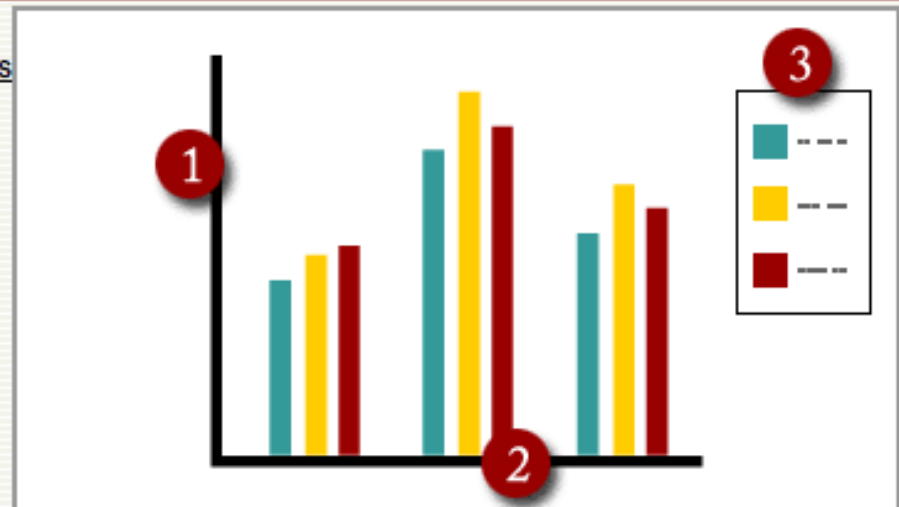
Sum of Amount ①

X-Axis

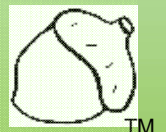
Amount ②

Groupings

Amount ③



Step 7, Select Chart and Highlights, Chart Settings include: Chart Type as 'Vertical Column – Grouped, Y-Axis as 'Sum of Amount', X-Axis as 'Amount' and Groupings as 'Amount'.



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount

Chart Colors and Presentation

Size: Large | Location: Bottom of Report

Title Color: [Black] | Title Size: 18 pt. | Chart Title: Donor Pyramid by Donor Number Past2 Yrs

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

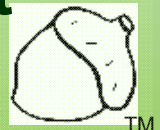
Background Fade: Diagonal | from [] to []

Legend Position: Right

Y-Axis Range: Automatic

Show Axis Labels

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



① 'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount

Generated Report:

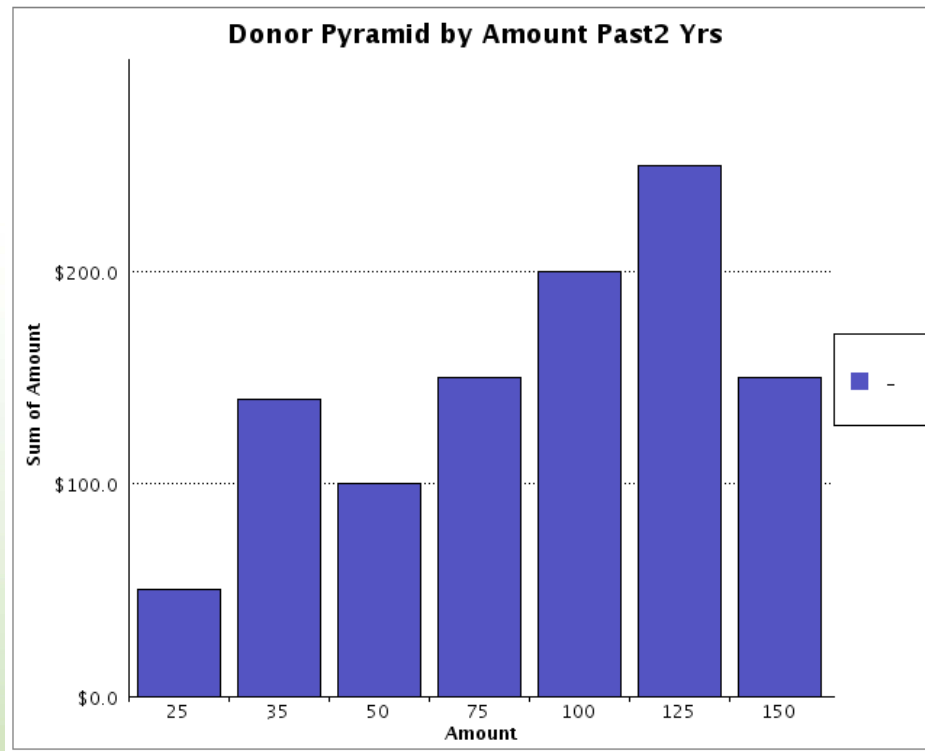
| <u>Close Date</u> | <u>Donation Quantity</u> | <u>Donation Name</u> |
|--|--------------------------|--|
| <input type="checkbox"/> Amount: \$25.00 (2 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>DaTest, Good Household Donation - 5/23/2007</u> |
| 5/23/2008 | | - <u>Test, Itsa Household- Donation 5/23/2008</u> |
| <input type="checkbox"/> Amount: \$35.00 (4 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>Isotester, Versa Household Membership - 5/23/2007</u> |
| 5/23/2007 | | - <u>Tester, Little Household Membership - 5/23/2007</u> |
| 5/23/2008 | | - <u>Isotester, Versa Household- Donation 5/23/2008</u> |
| 5/23/2008 | | - <u>DeTest, Love Household Membership - 5/23/2008</u> |
| <input type="checkbox"/> Amount: \$50.00 (2 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>Tester, Big Household Donation - 5/23/2007</u> |
| 5/23/2007 | | - <u>DeTest, Love Household Donation - 5/23/2007</u> |
| <input type="checkbox"/> Amount: \$75.00 (2 records) | | |

The Generated Report will be a list of donations sorted by amount including both years. A partial view is shown here.



'Donor Pyramids' for Past 2 Years

Pyramids by Donation Amount

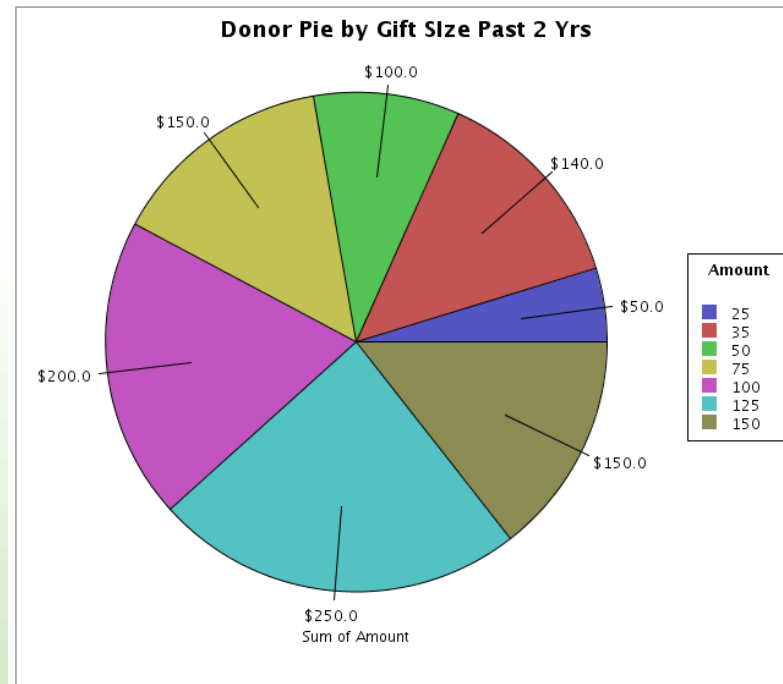


This is the generated chart. Be sure to save this report with a new name.



'Donor Pyramids' for Past 2 Years

Pyramids by Donation Amount



Here is the same Donor Pyramid shown as a Donor Pie. Start from within the previous report.



'Donor Pyramids' for Past 2 Years

Pyramids by Donation Amount

Step 7: Select the Chart Type and Report Highlights

Select the type of chart and additional charting options.

Chart Settings

Chart Type

Pie

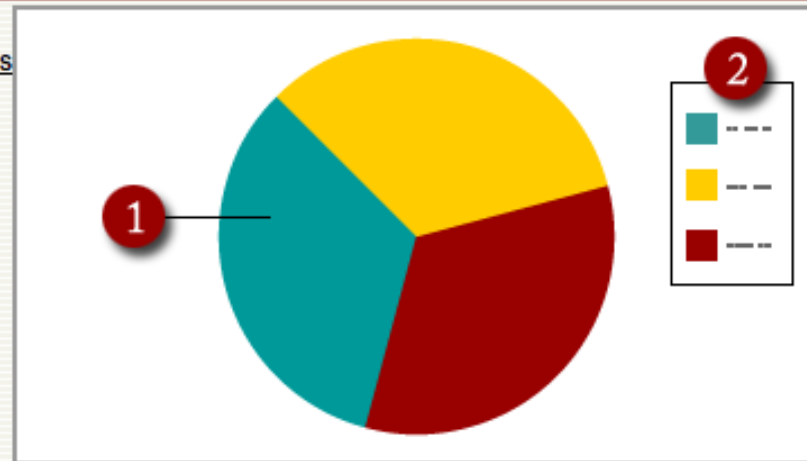
[View Chart Types](#)

Values

Sum of Amount

Wedges

Amount



Click the 'Customize' button. Then Jump to Step 7, Select Chart & Highlights. Change Chart Type to 'Pie'; Values and Wedges will automatically adjust to the values shown. Give the chart a new Title and Run Report.



'Donor Pyramids' for Past 2 Years

Pyramids by Donation Amount

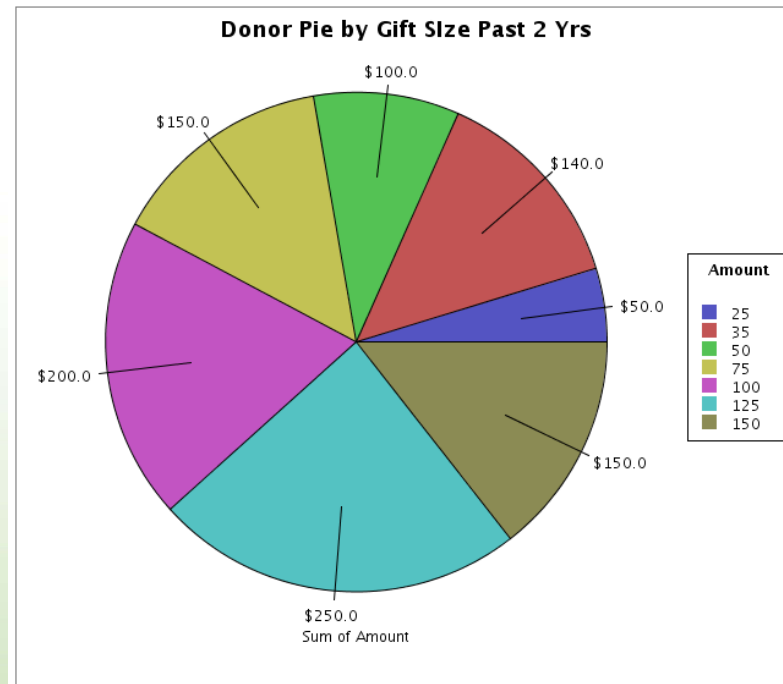
Generated Report:

| <u>Close Date</u> | <u>Donation Quantity</u> | <u>Donation Name</u> |
|--|--------------------------|--|
| <input type="checkbox"/> Amount: \$25.00 (2 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>DaTest, Good Household Donation - 5/23/2007</u> |
| 5/23/2008 | | - <u>Test, Itsa Household- Donation 5/23/2008</u> |
| <input type="checkbox"/> Amount: \$35.00 (4 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>Isotester, Versa Household Membership - 5/23/2007</u> |
| 5/23/2007 | | - <u>Tester, Little Household Membership - 5/23/2007</u> |
| 5/23/2008 | | - <u>Isotester, Versa Household- Donation 5/23/2008</u> |
| 5/23/2008 | | - <u>DeTest, Love Household Membership - 5/23/2008</u> |
| <input type="checkbox"/> Amount: \$50.00 (2 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>Tester, Big Household Donation - 5/23/2007</u> |
| 5/23/2007 | | - <u>DeTest, Love Household Donation - 5/23/2007</u> |
| <input type="checkbox"/> Amount: \$75.00 (2 records) | | |
| | 0.00 | |
| 5/23/2007 | | - <u>McTester, Tester Household Membership - 5/23/2007</u> |

Here is the same Donor Pyramid shown as a Donor Pie.



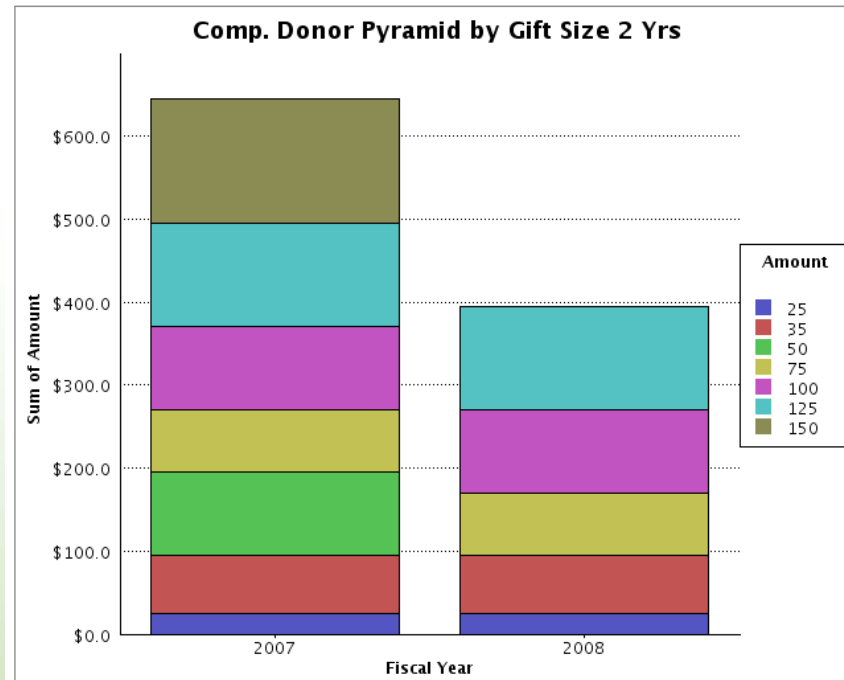
'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount



The Generated Report will be the same, but the Generated Report will be the pie chart shown above. Save this report with a new name.



'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount



Here is the fancy chart comparing the past two years as stacked Donor Pyramids. Start with the comparative pyramid report created for the pyramids by donation count. Run the report. Click Customize.



'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount

Step 7: Select the Chart Type and Report Highlights

Select the type of chart and additional charting options.

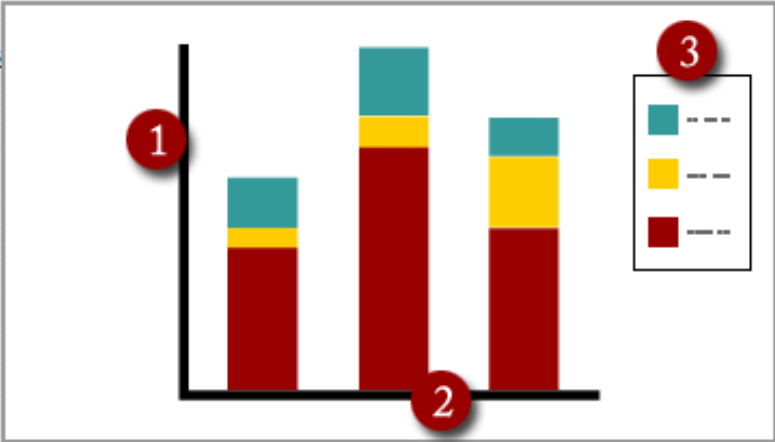
Chart Settings

Chart Type
Vertical Column - Stacked View Chart Types

Y-Axis
Sum of Amount 1

X-Axis
Fiscal Year 2

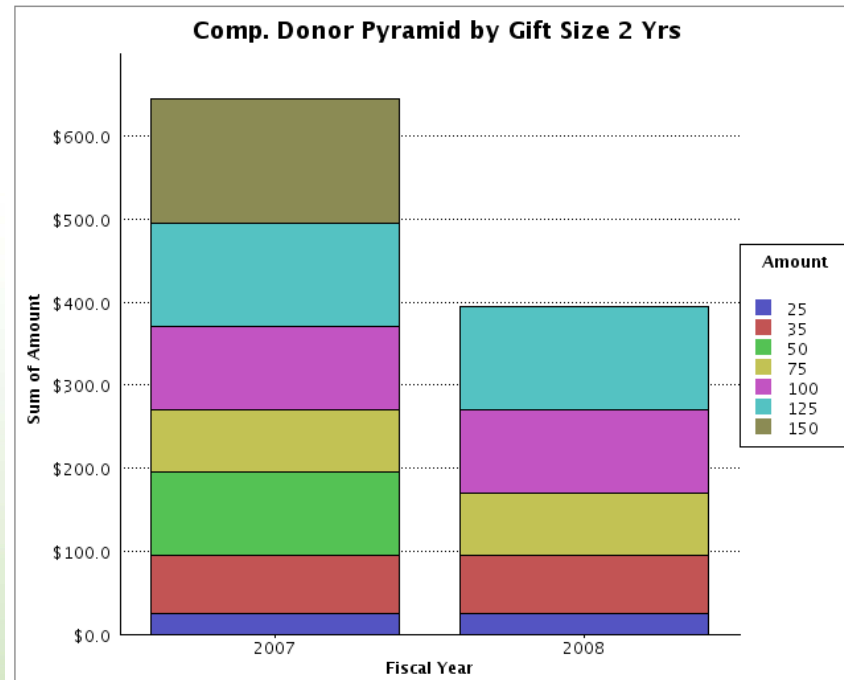
Groupings
Amount 3



Skip to Step 7. Set Y-Axis to Sum of Closed. Give the chart a unique title. All other fields will remain the same. Run report.



'Donor Pyramids' for Past 2 Years Pyramids by Donation Amount



Here is the fancy chart comparing the past two years as stacked Donor Pyramids. The Generated Report will be the same, but the Generated Chart compares gifts by sixe against total gifts.



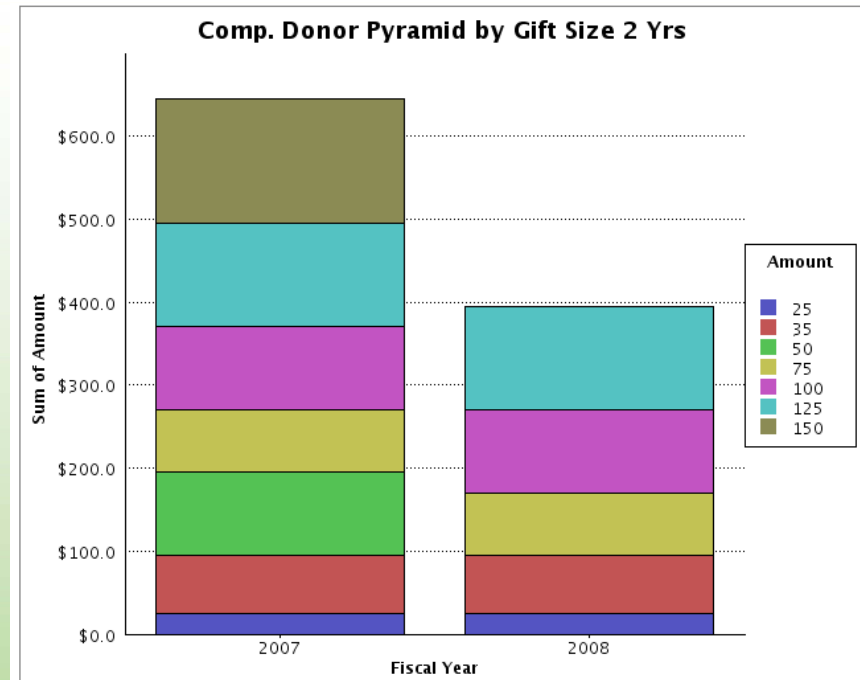
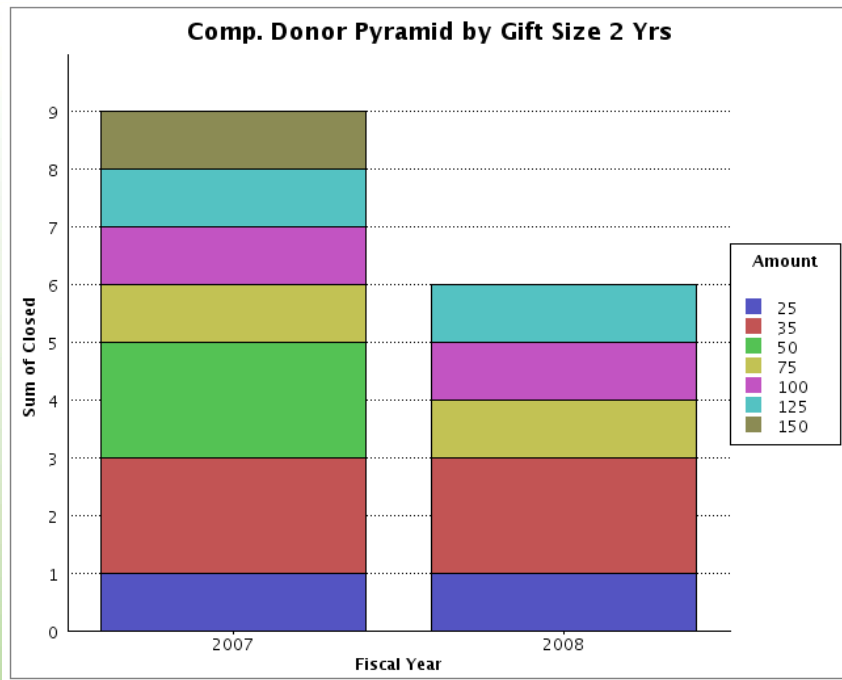
Salesforce Report 'Recipes'

**'Donor Pyramids' for Past 2 Years
Extra Credit!**



'Donor Pyramids' for Past 2 Years Extra Credit!

Be Inquisitive - Compare Your 'Donor Pyramid's

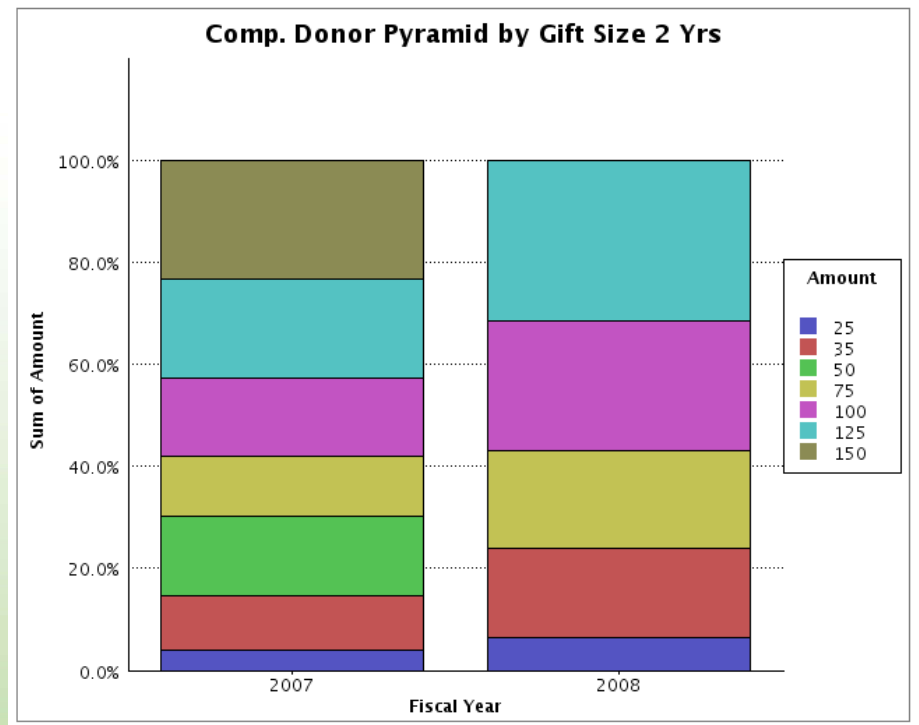
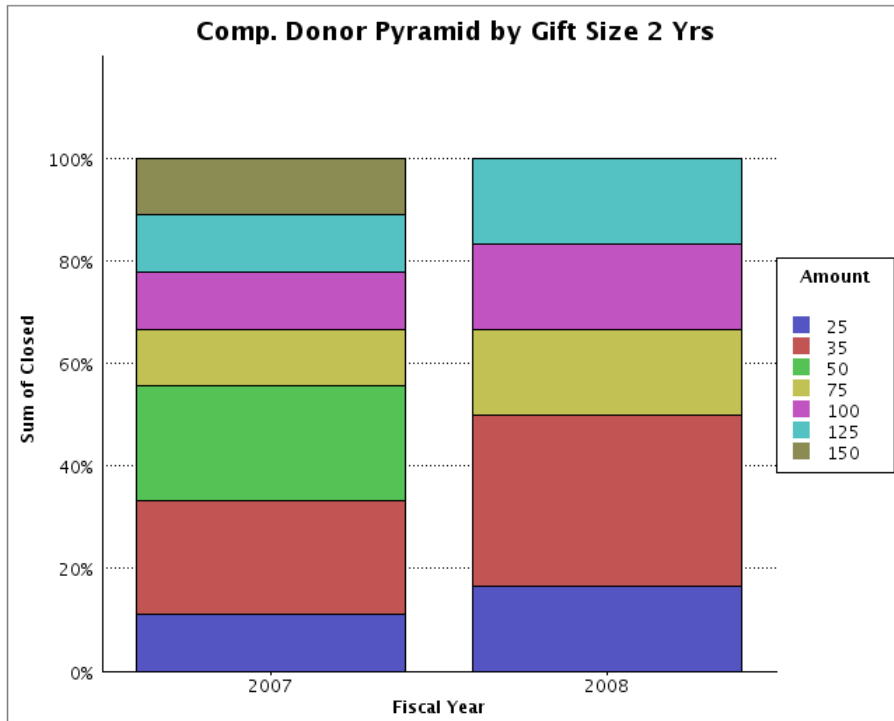


Cut and paste your pyramids; set them side by side.



'Donor Pyramids' for Past 2 Years Extra Credit!

Be Inquisitive - Change Up Your Pyramid's



Customize your comparative reports. Skip to step 7; change Chart Type to Vertical Column – Stacked to 100%. Remember to change chart title and save the report with a unique name.

