# Nonprofit Success Pack Reports Workbook

@salesforcedocs

Last Updated: November 26, 2018

# Contents

Contents

# 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.

**Thank you**: 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 Lowrey
- 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 of NPSP starting at version 3.90 (February 2017). If you started a Trial before this version and date, or installed NPSP without starting from a Trial version, 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. |

| Report Title | Description |
|---|---|
| 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. |
| General Accounting Units | Provides various summary calculation figures for individual General Accounting Units. Click Show Details to see a breakdown of Allocations by Opportunity. |

| Report Title | Description |
|---|---|
| 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 | Compare giving this year to the previous three years and get a quick overview of your recent and top donors. Includes charts showing:<br>• Giving by Account Record Type this Year<br>• Giving by Opportunity Record Type this Year<br>• Giving by GAU this Year<br>• Giving by Account Record Type Last 3 Years<br>• Giving by Opportunity Record Type Last 3 Years<br>• Giving by GAU Last 3 Years<br>• 25 Most Recent Gifts this Year<br>• Top 25 Household Gifts this Year<br>• Top 25 Organization Gifts this Year |
| Development Forecasting | Review giving in your pipeline, and find and cultivate new potential donors. Includes charts showing:<br>• Open Opportunities by Stage<br>• Open Opportunities by Record Type<br>• Open Opportunities by Campaign<br>• Overdue Payments<br>• Expected Payments Next 90 Days<br>• Top Delinquent Accounts<br>• Pipeline by Month and Stage<br>• Top 25 LYBUNT Households<br>• Top 25 LYBUNT Organizations<br>• Top 25 SYBUNT Households<br>• Top 25 SYBUNT Organizations |

| Dashboard Title | Description |
|---|---|
| Giving Range Analysis | Break your donors into groups and review each individually for patterns year over year. Includes charts showing:<br>• Amount by Range 2yrs Ago<br>• Amount by Range Last Year<br>• Amount by Range This Year<br>• Donors by Range 2yrs Ago<br>• Donors by Range Last Year<br>• Donors by Range This Year |
| NPSP Campaign ROI Analysis | Compare your fundraising campaigns and analyze their success. Includes charts showing:<br>• Total Donations by Campaign<br>• Total Donations vs Actual Cost<br>• Return on Investment (ROI)<br>• Cost Per Donor (CPD)<br>• Cost Per Dollar Raised<br>• Return on Initial Investment (ROII)<br>• Net Per Donor Average Donation<br>• Number of Donations |

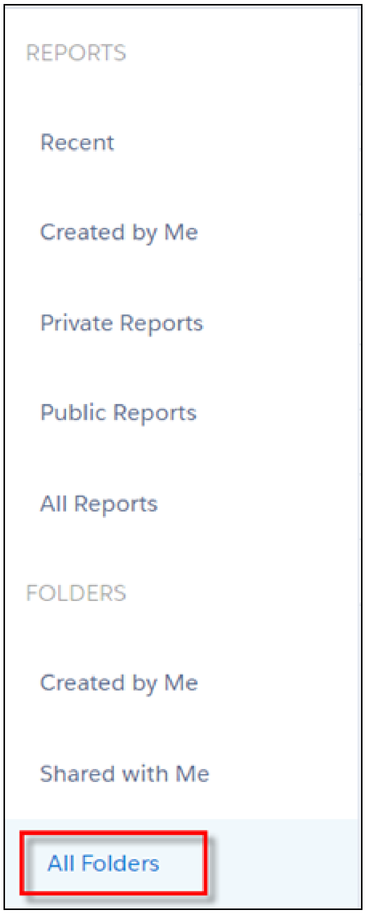
# Where to Find the NPSP Reports and Dashboards

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.

To find the reports folders:

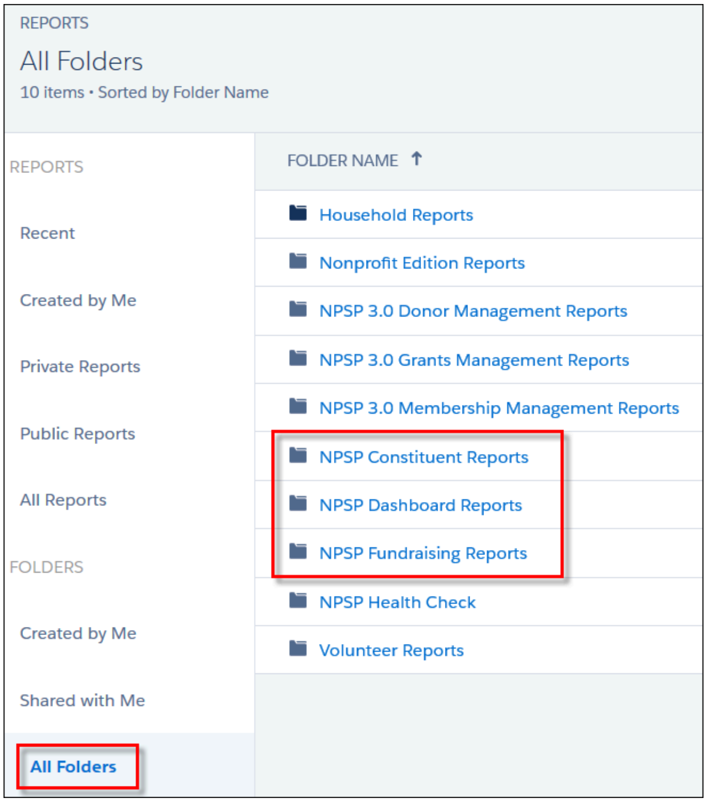
1. Click **Reports** in the navigation bar. If you don't see reports, you may need to click the App Launcher ( ), then scroll down to All Items.

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.

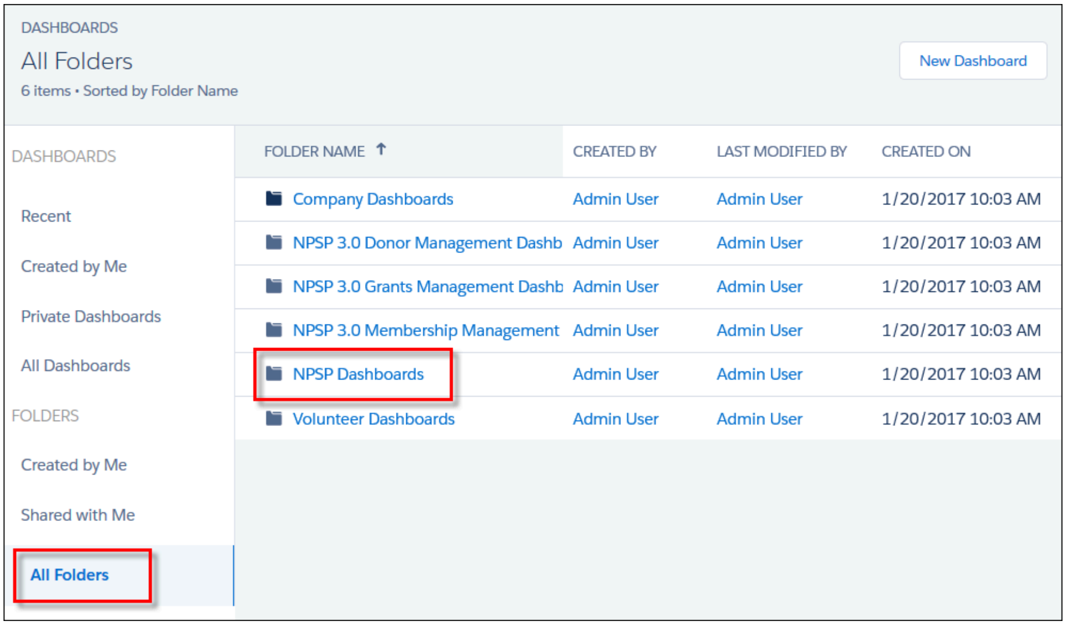



**Important**: We recommend that you change the folder sharing access for all non-Administrators to Viewer, so that these users are unable to edit the reports directly. That way you're preserving the out-of-box reports, but users will still be able to easily customize them and save as copies.

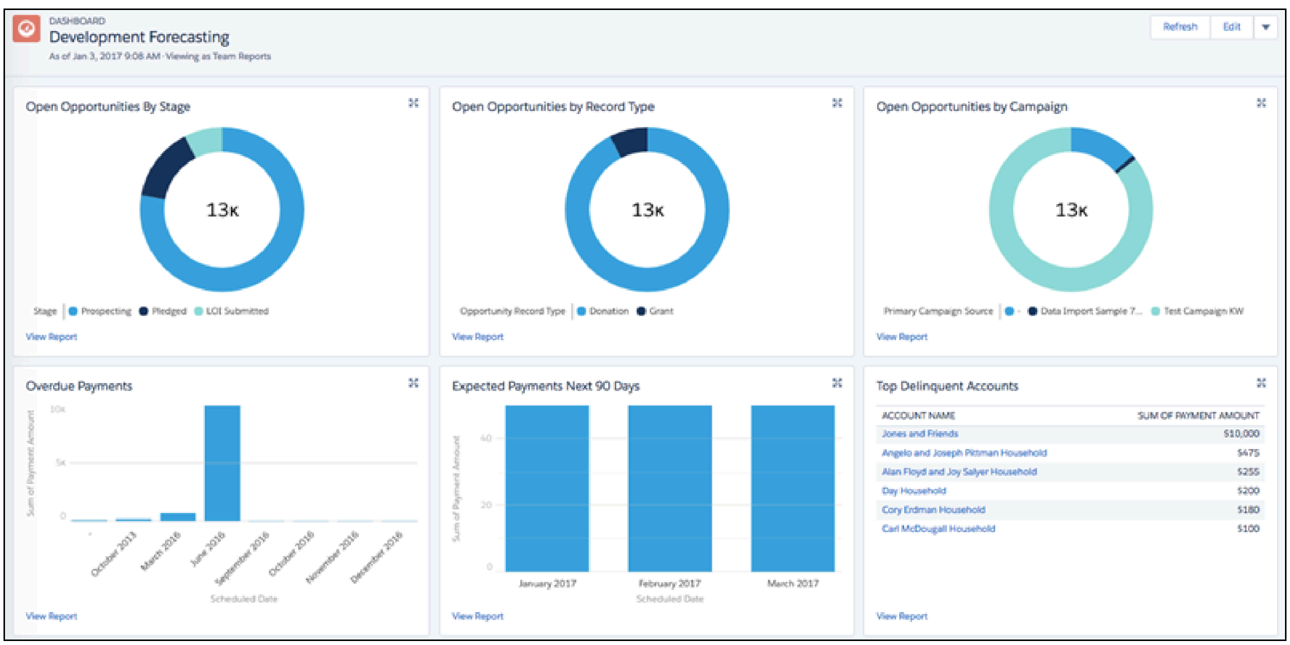
**Note**: You may notice the other NPSP report folders (NPSP 3.0 Donor Management Reports, NPSP 3.0 Grants Management Reports, NPSP 3.0 Membership Management Reports). These are the old NPSP reports that we're replacing. For more information on hiding these reports, see What To Do with Old NPSP Reports and Folders on page 26.

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**.




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



# 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

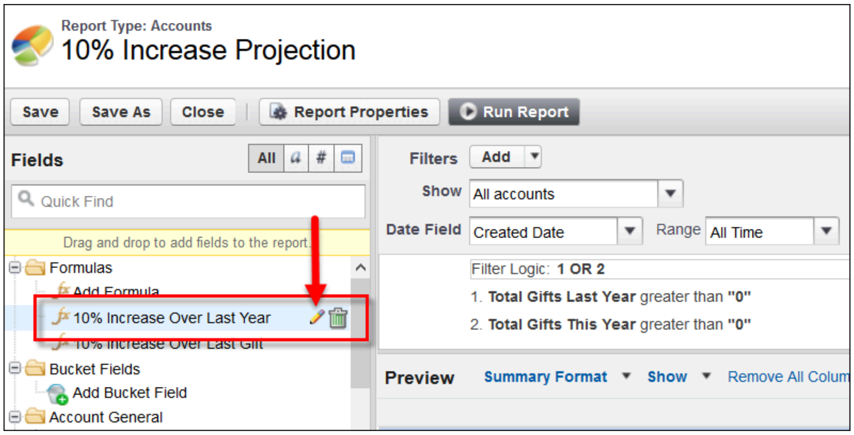
**Key Learning Objective:** Edit summary formula fields

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.

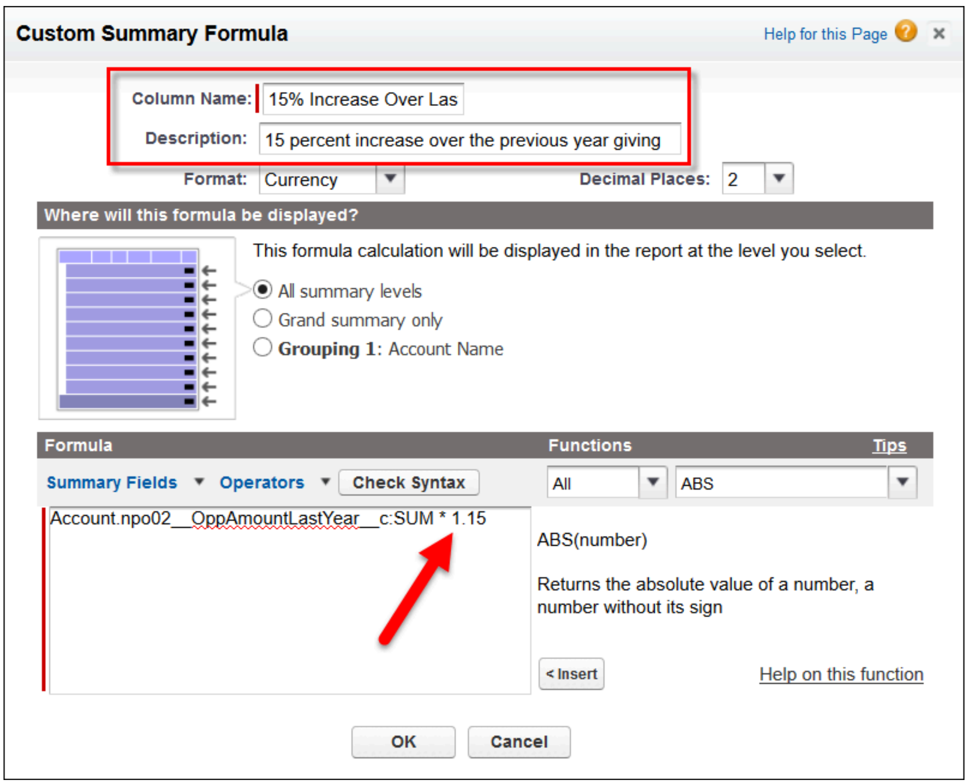
Perhaps you want to project a 15% or 20% increase instead of 10%. This is a quick and easy customization that is achieved by changing the formula associated with the report. Let's walk through it.

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.

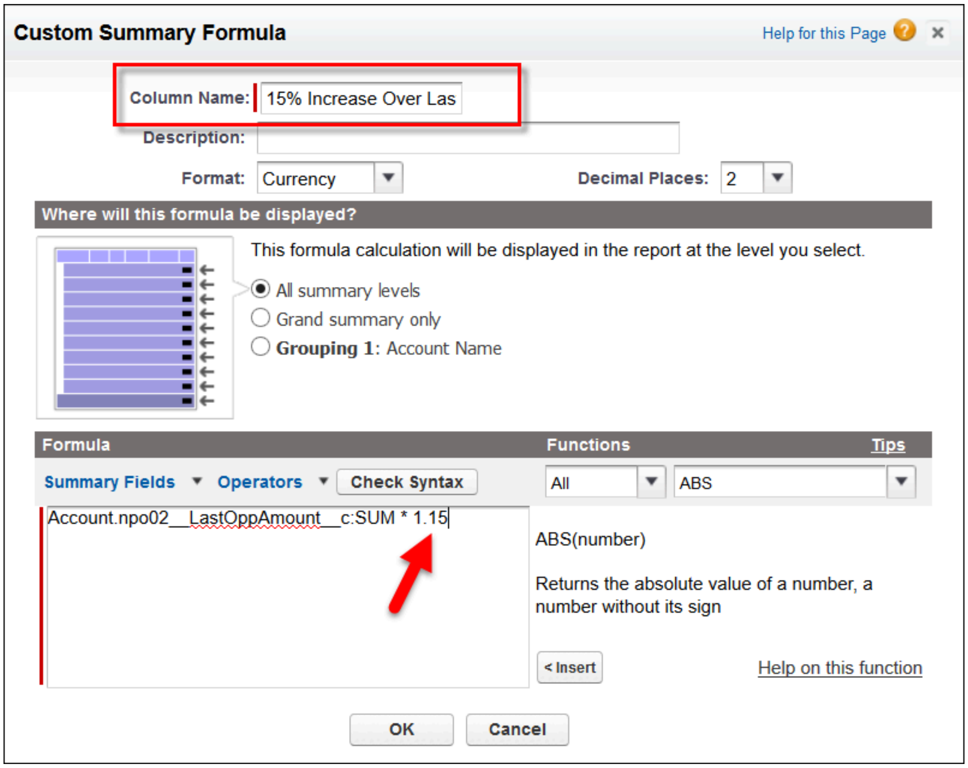



6. In the formula field, change the 1.10 to 1.15 (15 % increase) or 1.2 (20% increase) or whatever percentage you'd like to use. Also, change the Column Name and Description to match your new percentage.



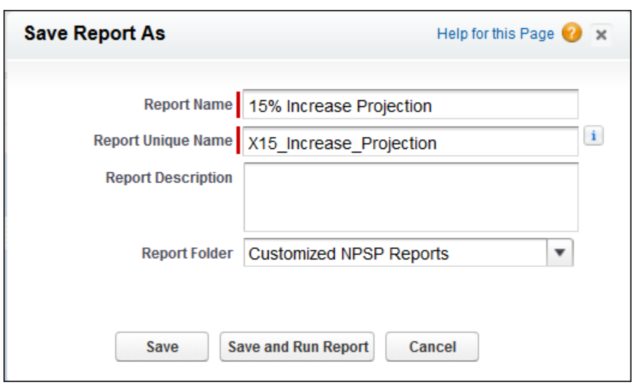

7. Click **OK**.

8. Repeat these steps for the 10% Increase Over Last Gift formula.



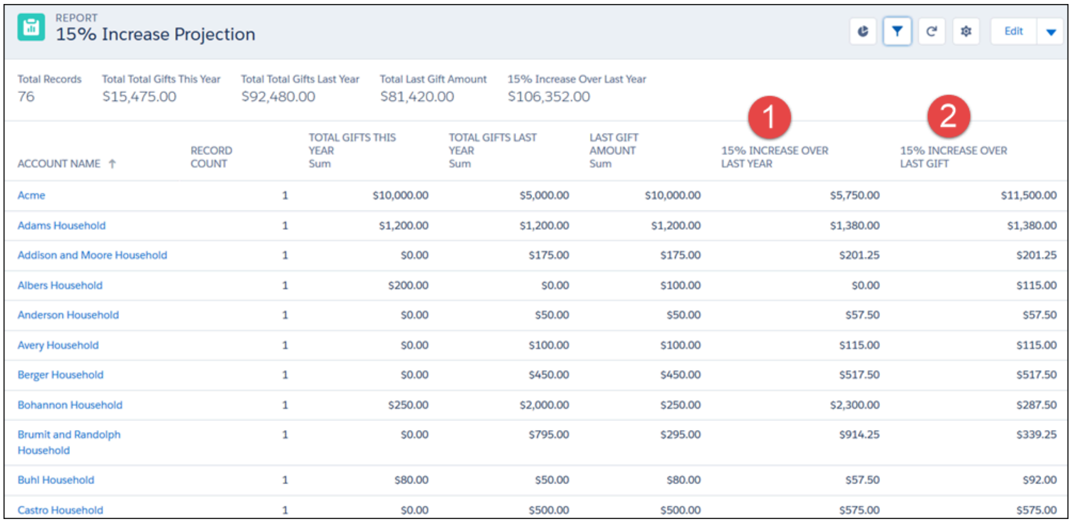

9. Click **Save As**.

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.




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

Edit

| 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 | 1 15% INCREASE OVER LAST YEAR | 2 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 |

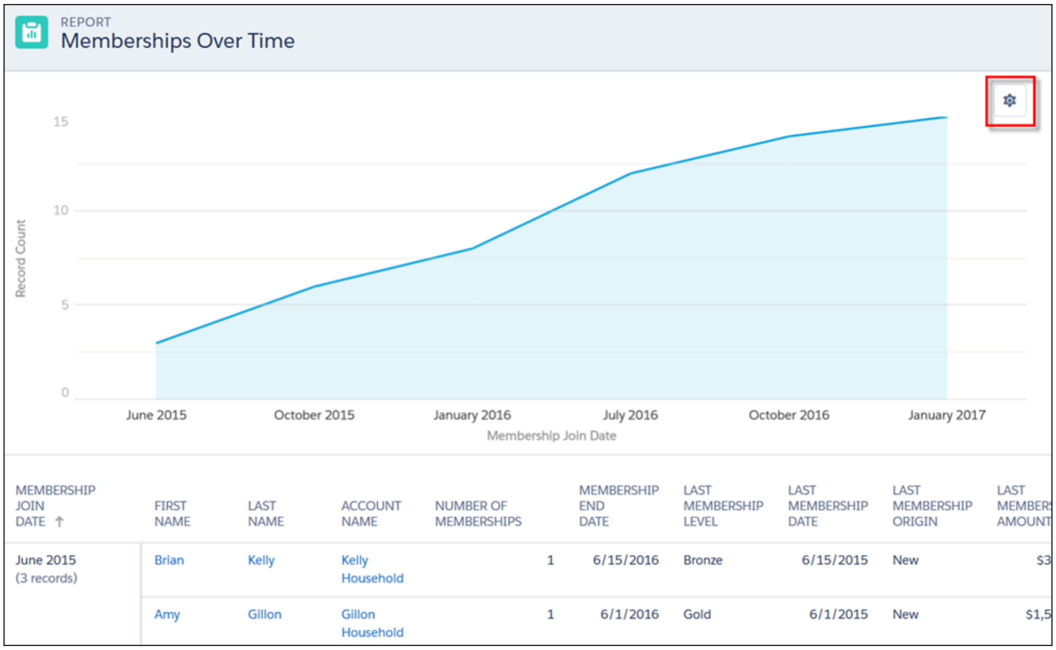
# TUTORIAL: Customize the Memberships Over Time Report

**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.

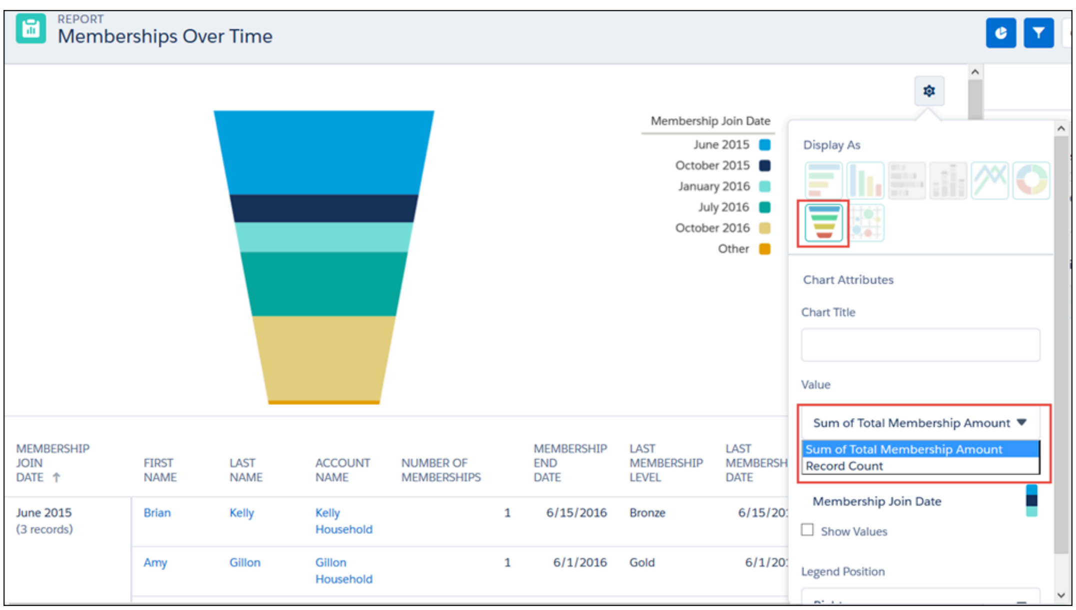
1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Constituent Reports**.
3. Click **Memberships Over Time**.

4. To edit the chart, click the gear icon on the upper right side.



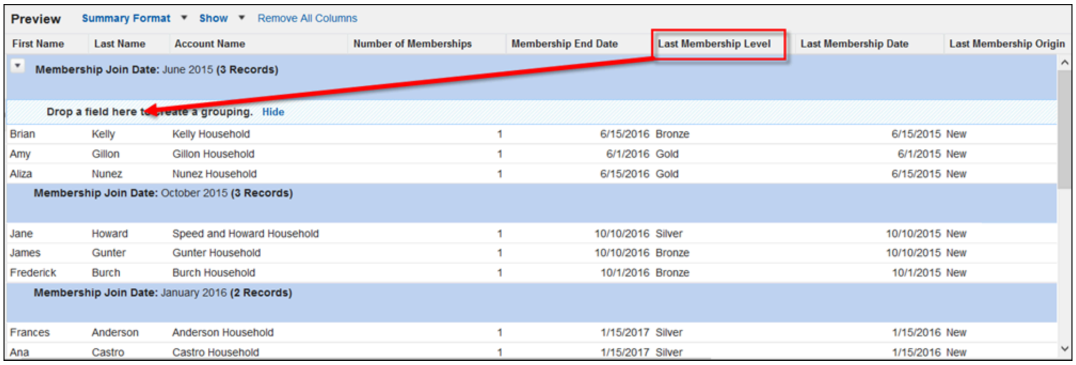

From here you can change the chart type, edit the value, change chart colors, and give the chart a title.

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



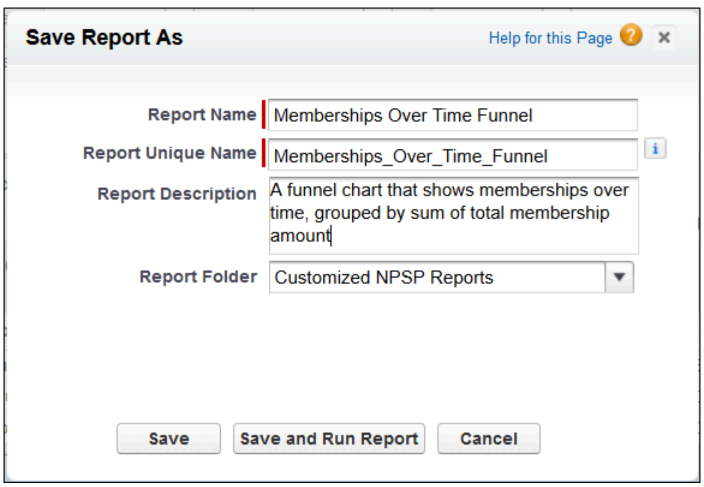

6. Click outside the Chart details, then click **Edit**.

7. To group by membership level, drag the Last Membership Level column to the drop zone underneath the Membership Join Date.



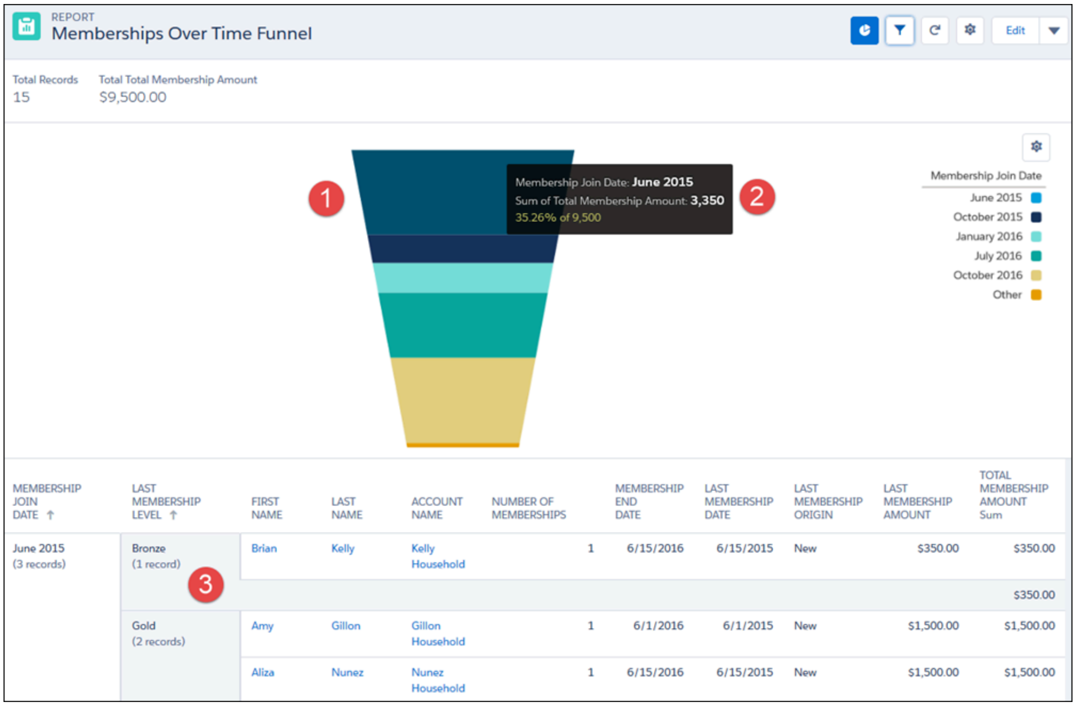
8. Click **Save As**.

9. 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.




10. 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).



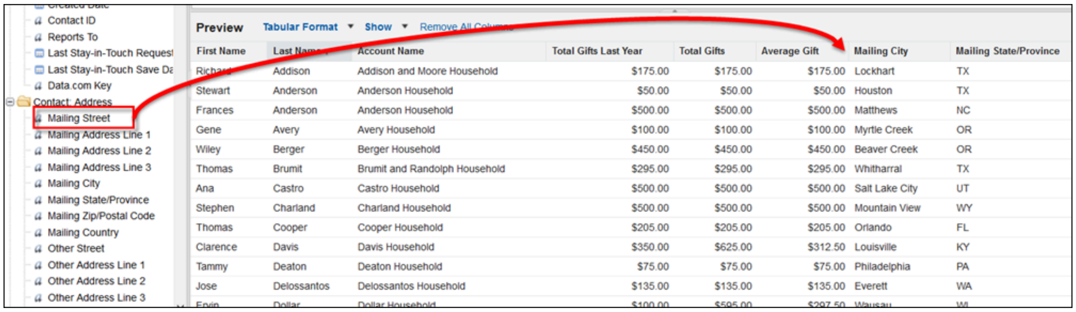

# TUTORIAL: Customize the Contact LYBUNT Report

**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.

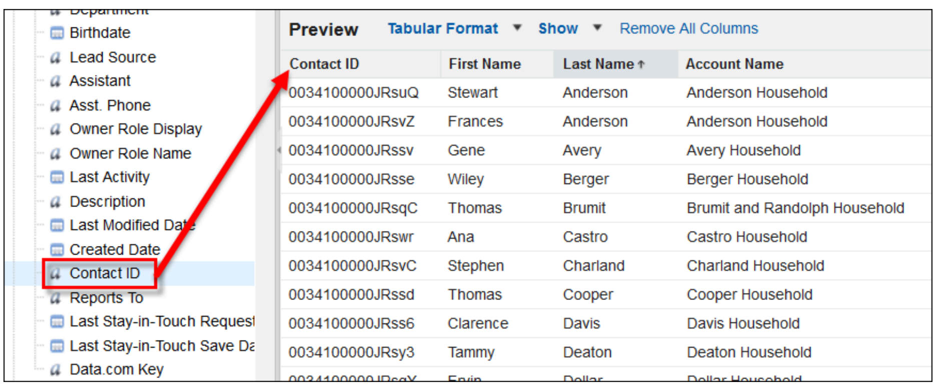
1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Fundraising Reports**.
3. Click **Contact LYBUNT**.
4. Click **Edit**.

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.

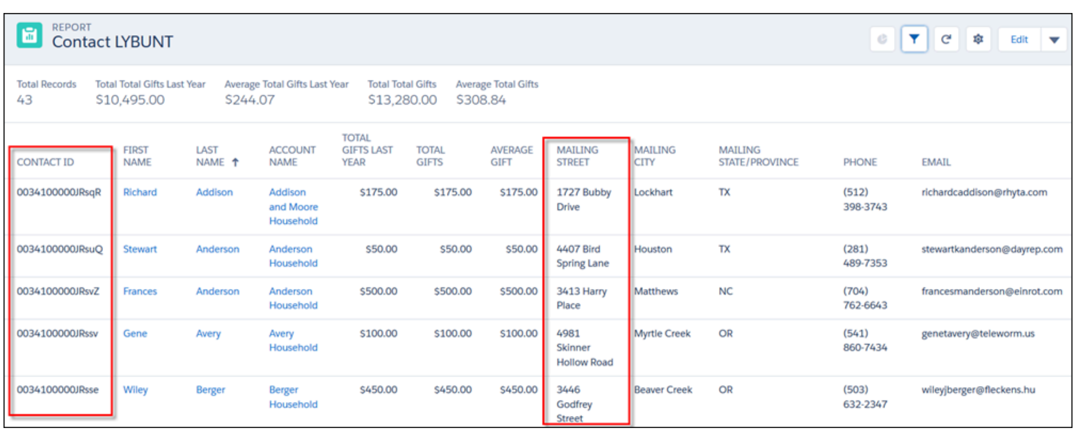



6. Add the Contact ID field by dragging it from the left side to the far left side of the report (it becomes the first column).

**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.

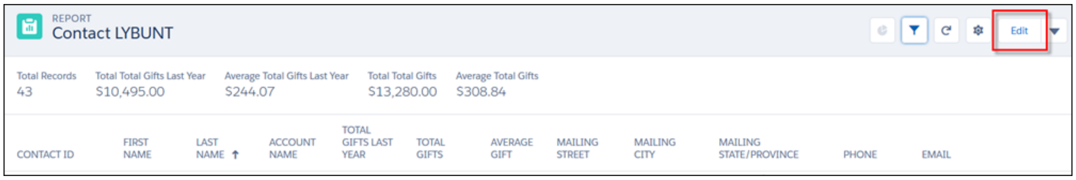



7. Click **Run Report** to see your new fields.

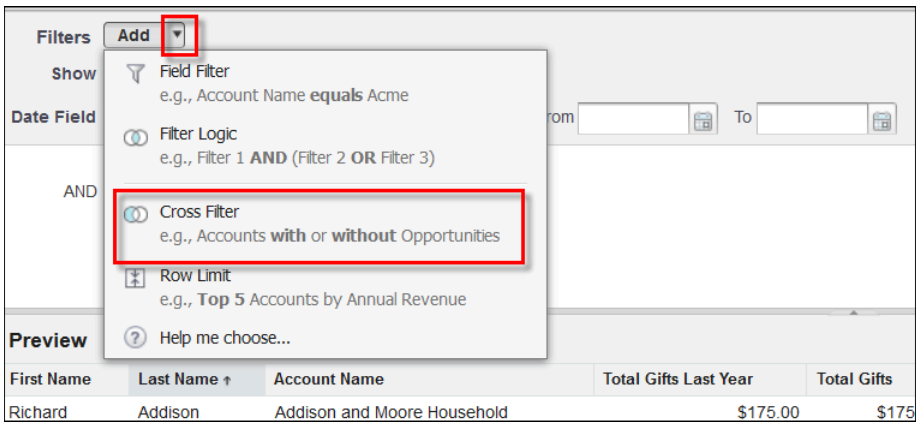



What a great start! Your two new fields are helping to shape this mailing list. Before we add any filters to this report, check out the first entry, Richard Addison. Richard meets the criteria for the Contact LYBUNT report, so you see his name listed in the results. Let's see what happens to Richard 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.



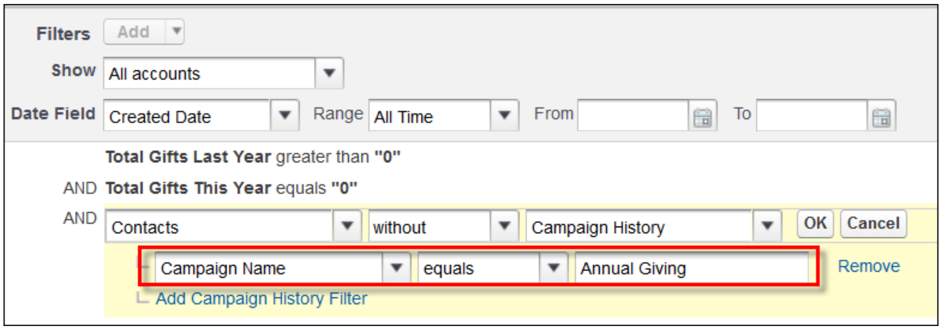

9. In the Filter field, click the drop-down next to Add (don't click Add), then click **Cross Filter**.



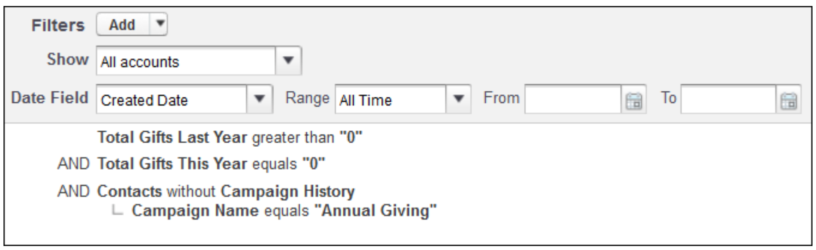

10. Enter `Contacts without Campaign History`, then click **Add Campaign History Filter**.

> **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.

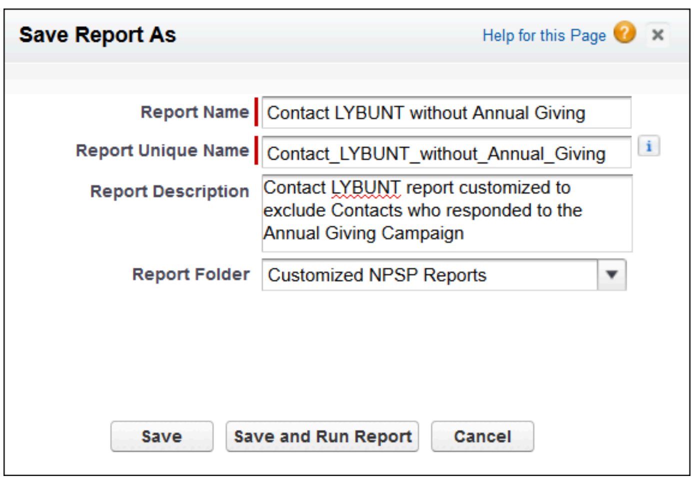
11. Enter `Campaign Name equals Annual Giving` (replace the example Annual Giving Campaign with your own Campaign name), then click **OK**.




Your customized filters should look like this:




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.



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 | Total Total Gifts Last Year | Average Total Gifts Last Year | Total Total Gifts | Average Total Gifts |
|---|---|---|---|---|
| 36 | $8,615.00 | $239.31 | $10,415.00 | $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 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 0034100000JRsvZ | Frances | Anderson | Anderson Household | $500.00 | $500.00 | $500.00 | 3413 Harry Place | Matthews | NC | (704) 762-6643 | francesmanderson@einrot.com |
| 0034100000JRsuQ | Stewart | Anderson | Anderson Household | $50.00 | $50.00 | $50.00 | 4407 Bird Spring Lane | Houston | TX | (281) 489-7353 | stewartkanderson@dayrep.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 | wileyjberger@fleckens.hu |
| 0034100000JRsqC | Thomas | Brumit | Brumit and Randolph Household | $295.00 | $295.00 | $295.00 | 3080 Hilltop Drive | Whitharral | TX | (806) 299-1093 | thomassbrumit@superrito.com |
| 0034100000JRswr | 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

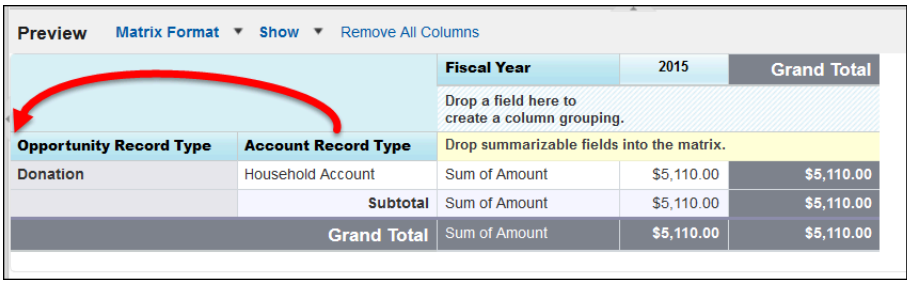
**Key Learning Objective:** Edit a matrix report

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!

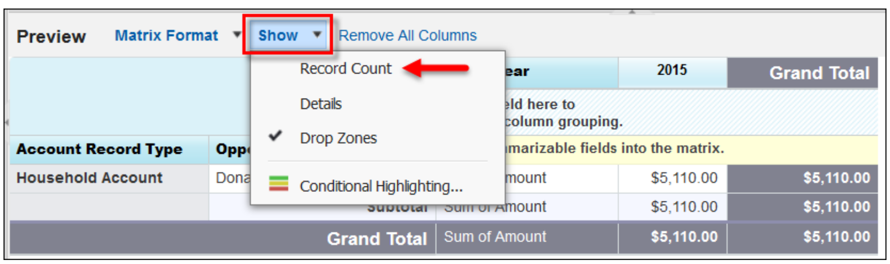
1. Click **Reports** in the navigation bar.
2. In the list of folders, click **NPSP Fundraising Reports**.
3. Click **Closed/Won Opps by Type and Fiscal Year**.

4. Click **Edit**.

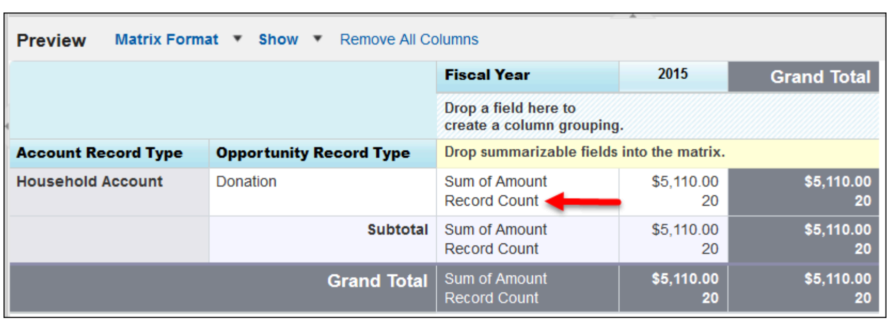

5. To change the report to sort first by type of Account, drag the Account Record Type column to before the Opportunity Record Type.



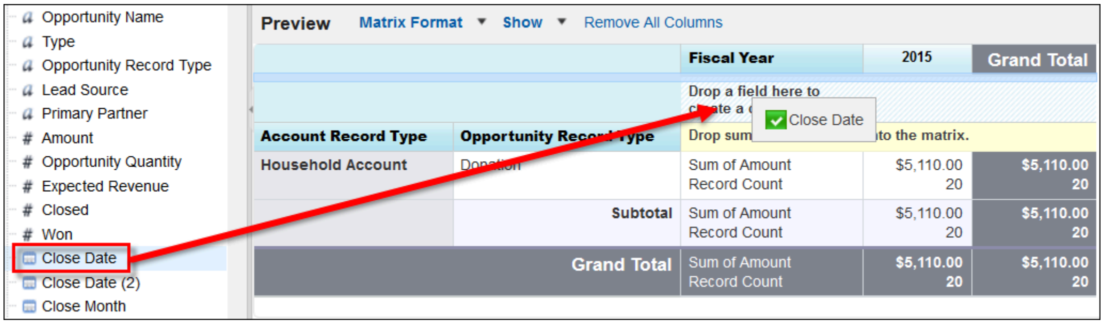

6. To show a record count, click **Show**, then click **Record Count**.



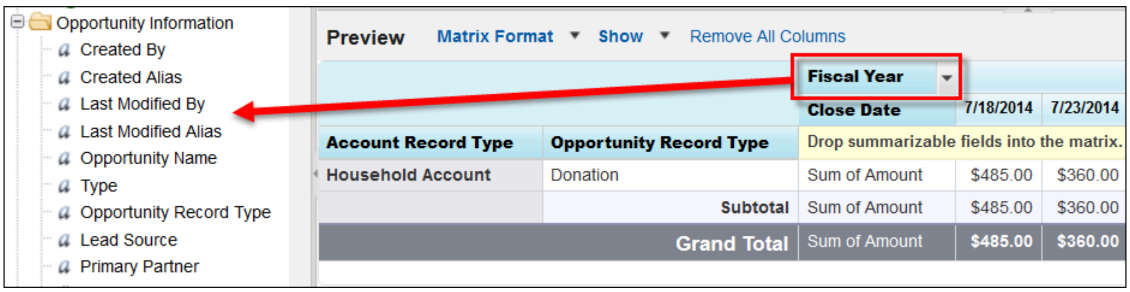

You'll see the Record Count appear under the Fiscal Year column.



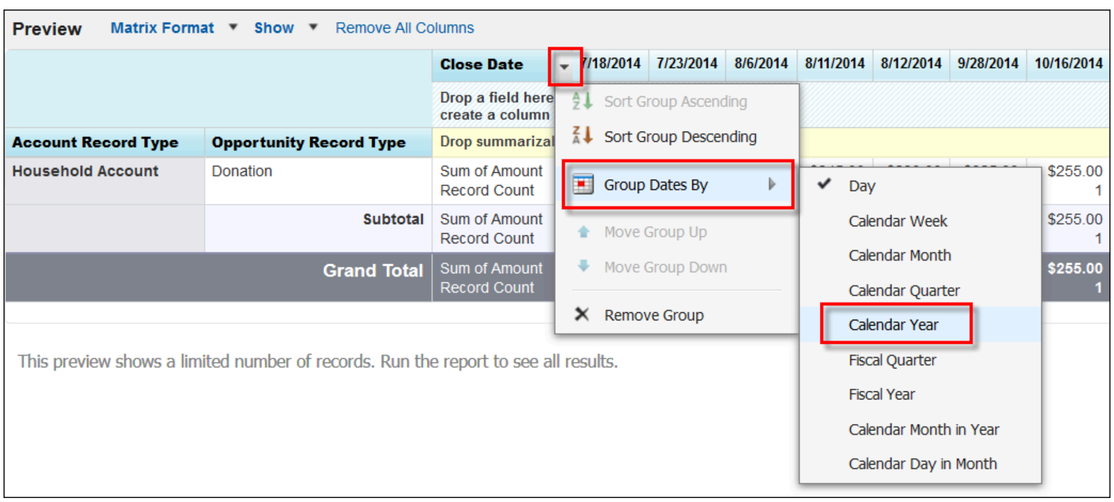
7. To use the Calendar Year instead of the Fiscal Year, first drag the Close Date field from the left side to under the Fiscal Year column.



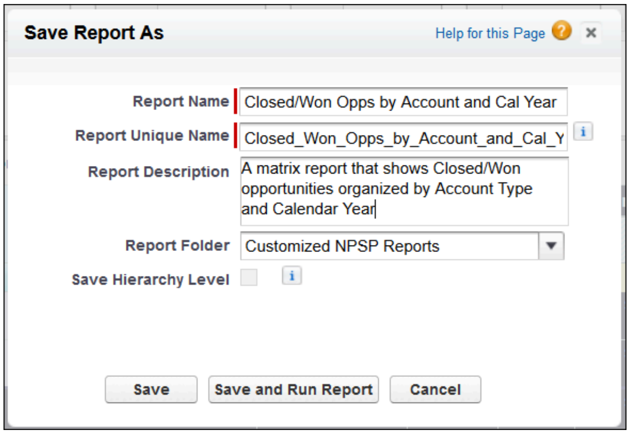

8. Remove the Fiscal Year column by dragging it back to the panel on the left side.




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

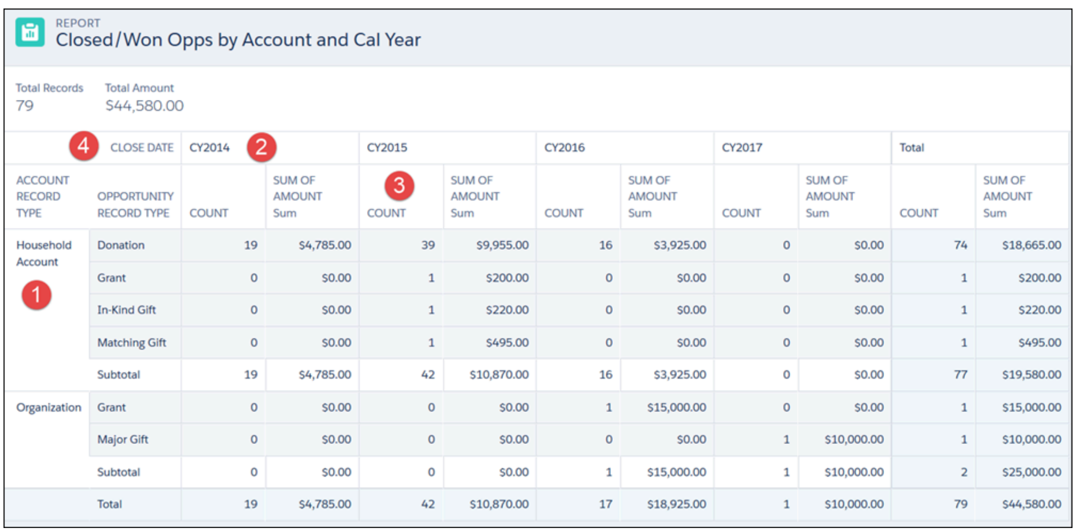


10. Click **Save As** and save your report with a unique name (you don't want to overwrite the original report!). Also, select a folder where you want to save the report.




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 79 Total Amount $44,580.00

| | CLOSE DATE | CY2014 | | CY2015 | | CY2016 | | CY2017 | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ACCOUNT RECORD TYPE | OPPORTUNITY RECORD TYPE | COUNT | SUM OF AMOUNT Sum | COUNT | SUM OF AMOUNT Sum | COUNT | SUM OF AMOUNT Sum | COUNT | SUM OF AMOUNT Sum | COUNT | SUM OF AMOUNT Sum |
| 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.

## Prerequisites–Before You Install

Before installing the new Reports, check that Reports and Dashboard settings are enabled and that your org contains a Grant record type.

If these items aren't set up as documented, your installation may fail.

1. Click , then click **Setup**.
2. Verify Reports and Dashboards Settings are enabled.
    a. Enter `Reports and Dashboards` in the Quick Find box, then click **Reports and Dashboards Settings**.
    b. On the Reports and Dashboards Settings page, look for an **Enable** button. It is typically present in older orgs. If you see the button, click it. If you don't see the button, move to the next step.
3. Make sure you have a Grant record type.
    a. Click the **Object Manager** tab.
    b. In the list of objects, click **Opportunity**, then click **Record Types**.
    c. Check for a record type named Grant. If you don't see a Grant record type, you will need to create it. Be sure to enter `Grant` for both the Record Type Label and Record Type Name.

> **Important**: If you already have a Grant record type but the name is something other than `Grant`, you still need to create a Grant record type. After installation you can point the Opportunity Record Type filter in the Grants this Year report to the correct Grant record type and delete the one you created just for the install.

One last important thing to note is that the user installing the Reports package must have a System Administrator profile. The System Administrator profile has all the permissions necessary to install the package. If a user with a different profile (who lacks some of the necessary permissions) tries to install the package, they will see errors.

# Install the Reports Package

If you started a Trial of NPSP prior to version 3.90 (February 2017) or installed NPSP without starting from a Trial version, you will need to install the NPSP reports in your organization.

**Important**: Make sure you review the Prerequisites before installing.

You must have a System Administrator profile to install the Reports package, as System Administrator profile has the permissions necessary to successfully install.

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.

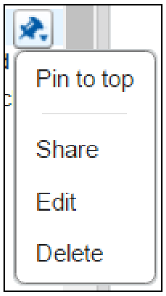
# Update Report Folder Access

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:

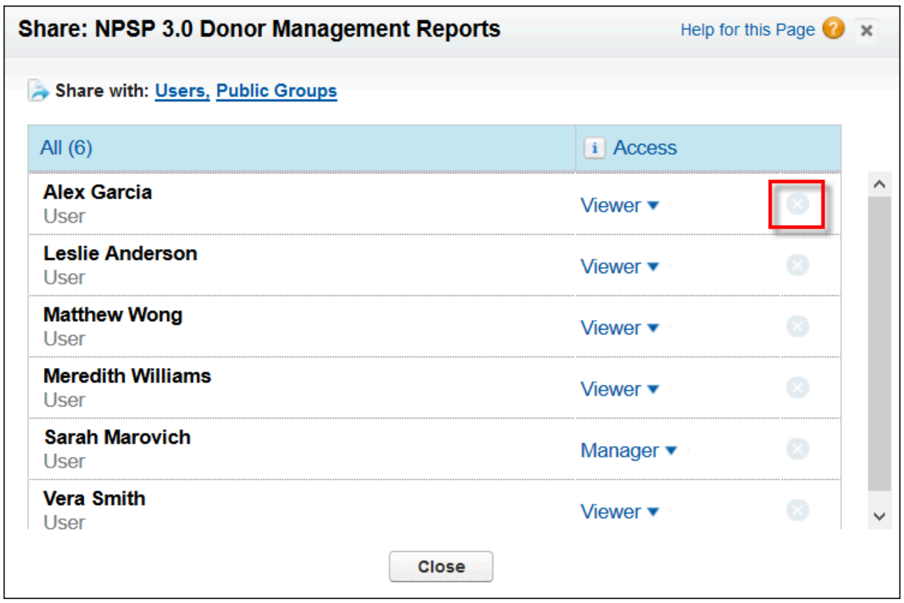
1. Switch to Salesforce Classic. You can't currently set sharing permissions on folders in Lightning Experience.
2. Click the **Reports** tab.

3. Hover over the name of the folder you want to hide, click the Pin icon, then click **Share**.

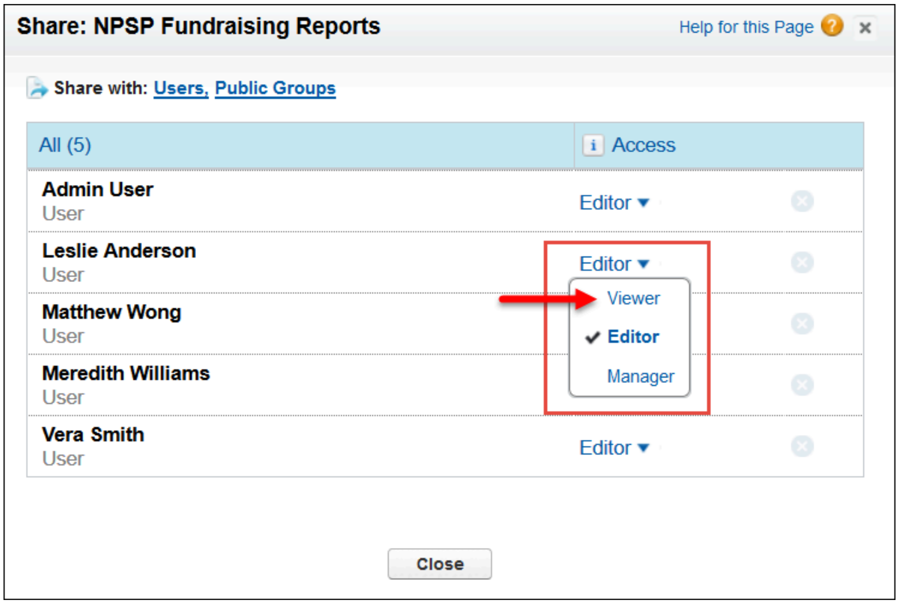



4. To hide this folder from the user, click next to the user's name.

   We recommend you hide the old NPSP 3.0 folders from all non-Admin users.



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.




6. Click **Close**.