Generating Reports in FinishLine CRM

Video Summary	
Preface	To complete this exercise, I created a fictional CRM system called **FinishLine CRM**. This allowed me to design custom interface visuals and simulate a realistic user experience for the video. By working within this simulated environment, I was able to demonstrate technical functionality while maintaining creative control over the look and flow of the system.
Video Title	**Generating Reports in FinishLine CRM**
Target Audience	This video is designed for nonprofit staff who use FinishLine CRM to manage donor and fundraising data. These users use the platform's self-service tools to access up-to-date, accurate information and generate reports as needed to support their fundraising efforts, track progress, and support decision-making. These users often need to pull data and reports on their own, without technical support, and they may vary in technical skill.
Learning Objectives	**After watching the video, learners will be able to:** • Generate a standard report directly from the FinishLine CRM dashboard. • Apply filter controls to customize reports based on date range, campaign, donor type, donor class and dollar amount.
Instructional Strategies	The instructional design for this video uses several of Mayer's 12 Principles of Multimedia Learning as its foundation. These include Coherence (excluding unnecessary content), Signaling (highlighting important visual elements), Spatial and temporal contiguity (presenting narration and visuals simultaneously or closely aligned), Modality (using narration explanations, rather than on-screen text), and others. The video exemplifies a user-centered microlearning approach, intended to quickly address a specific, high-priority task for FinishLine CRM customers. The design emphasizes clarity and ease of use, featuring screen simulations and relatable b-roll footage to enhance learner engagement and retention; so that the learner can immediately take what they've learned and utilize it in the FinishLine CRM.

Scope

Included

- Accessing the reporting function from the dashboard in two different ways
- Selecting reporting filters using drop-down menu
- Generating and previewing the report
- Exporting the report as and Excel or CSV file

Excluded

- Advanced reporting options (eg: auto-generating, direct emailing)
- Creating new report fields or templates
- Troubleshooting report generation

Key Messages / Takeaways

- Reporting in FinishLine CRM is quick and user-friendly
- Filters allow users to refine their data and generate reports on demand to get the data they need without the data they don't need.
- Reports can be exported for sharing, review, or further analysis.

Detailed Video Outline

1. **Intro**

- Brief narration introducing the video goal
- Visual: B-roll of person working at laptop, title screen with FinishLine logo
- Narration for context: "Whether you're preparing for a board meeting or checking in on a campaign, FinishLine makes reporting quick and easy."

2. **Dashboard**

- Show FinishLine CRM dashboard
- Narration: "You can generate reports in two ways, right from your dashboard."
- Highlight the Report Generator in the center of the page and the Reports button on the left side navigation menu

3. Method 1

- Highlight the dashboard filter toolbar in the center of the dashboard
- Narration explains selecting filters using drop-down menus
- Simulate selecting filters (Campaign, Donor Class, Dollar amount) and selecting **Generate Report**
- Show the report appearing below the filter toolbar
- Narration explains that longer reports may require scrolling
- Highlight **Export** button as narration explains that the report can be exported as Excel or CSV
- Select **View Full Report** button to simulate opening in a separate window (and explain export is also available there)

4. Method 2

- Narration: “You can also generate reports from the Dashboard menu in the left hand navigation.”
- Simulate selecting **Reports** in left-hand navigation
- Repeat the filter selection and Generate Report process on the Reports page
- Re-emphasize that both methods lead to the same reporting experience

5. Report Preview

- Narration: “Once your report is generated, you’ll see a table with donation data.”
- Show full page of data table
- Simulate selecting the Export button to export as (CSV, PDF)
- Mention that reports can be saved or shared as needed

6. Outro and Recap

- Narration: “Now you know how to generate and export a report using FinishLine CRM.”
- B-roll of nonprofit staff working together / reviewing documents.
- With FinishLine, reporting is simple, so you can spend time focusing on impact and less time generating spreadsheets
- B-roll of people smiling while volunteering
- End with logo and directive to support page