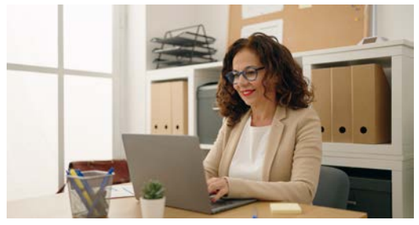
Storyboard

Video Title: Generating Reports in FinishLine CRM

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.

Scene	Visuals/screenshots	Narration script	On-screen text	Production Notes
1.Intro [0:00-0:12]	B-roll: Person working at laptop. Close-up of hand on mouse. FinishLine logo fades in over Dark Blue background. Logo fades out as on-screen text fades in.     	“Whether you're preparing for a board meeting or checking in on a campaign, FinishLine makes reporting quick and easy.”	Title frame: *"Generating Reports in FinishLine CRM"*	• Soft fade in/out between transitions • Upbeat corporate background music beneath narration • Subtle logo animation

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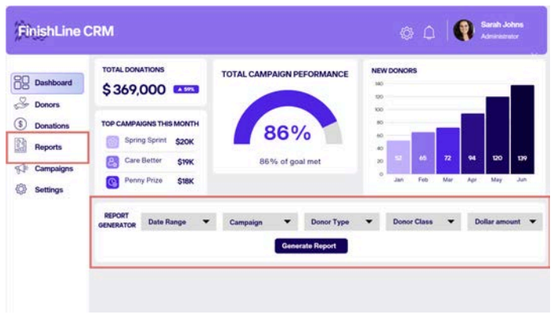
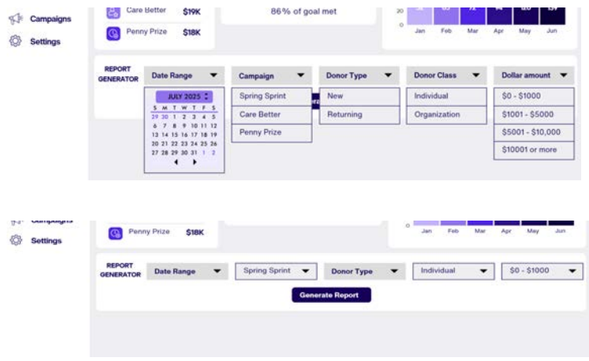
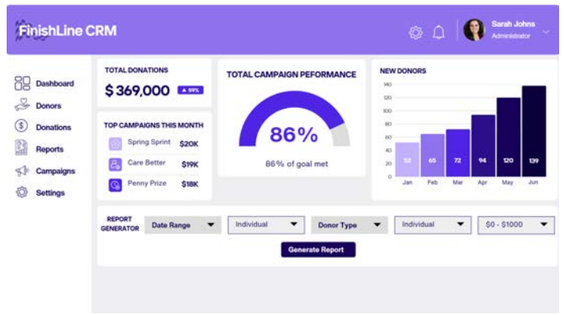
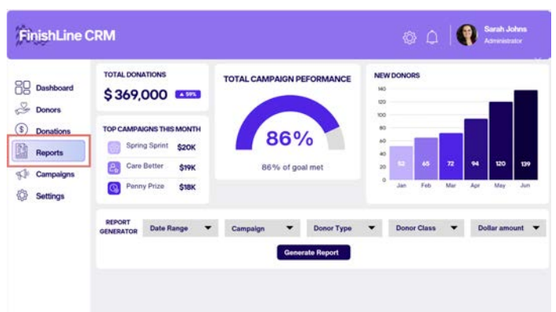
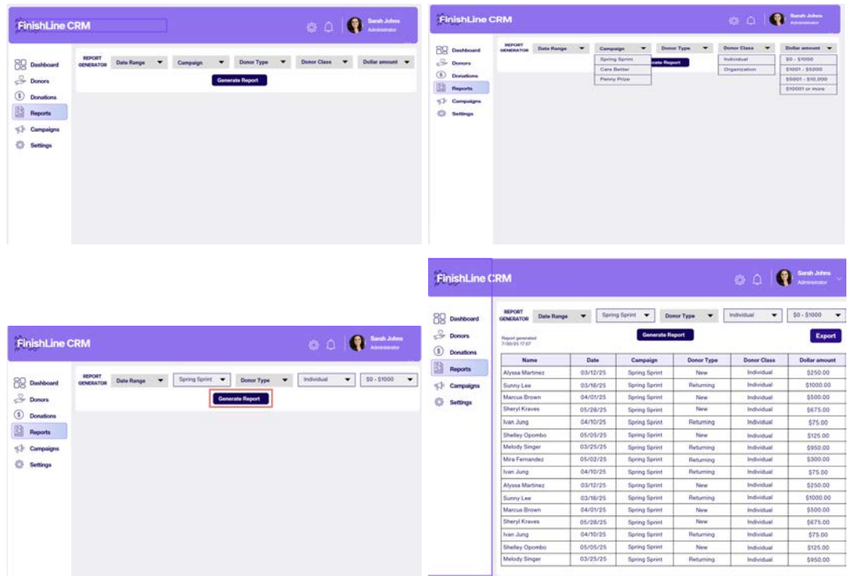
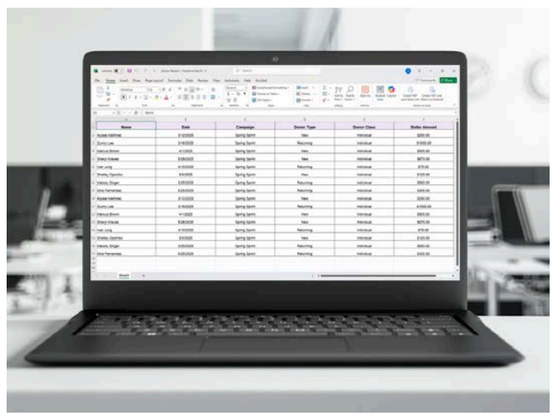
2.Dashboard [0:12-0:25]	Dashboard landing page with callouts 	"You can generate reports in one of two ways, right from your FinishLine dashboard. Either through the Report Generator in the center of the dashboard or by selecting the Reports tab in the left side navigation menu"	None	• Slide down scene transition • Callouts with pop effect surrounding the Report Generator toolbar and the "Reports" tab (left menu)
3.Method 1: Filter toolbar [0:25-0:50]	Dashboard landing page. Zoom-in on Report Generator toolbar and simulate cursor selecting and revealing each of the drop-downs. Simulate Campaign=Spring Sprint, Donor Class= Individual, and Dollar amount= $0-$1000. Zoom out to show full dashboard with filters selected. 	"Let's first take a look at the Report Generator. Start by selecting your desired report filters. You can filter by date range, fundraising campaign, Donor type, whether they are a new or returning donor, Donor class, whether they are an individual or organization, and dollar amount."	Method 1: The Dashboard Report Generator.	Simulate selecting dropdown menus and selections with cursors.

Scene	Visuals/screenshots	Narration script	On-screen text	Production Notes
3.Method 1: Filter Toolbar Cont'd [0:50-0:56]	Zoom out to show full dashboard. Simulate selecting "Generate Report" with cursor. 	"Once you've selected all of your report filters, select "Generate Report."	None	• Zoom out to show full dashboard • Simulate selecting "Generate Report" with a cursor
[0:56-1:15]	Generated report. Highlighted "Export" and "Close Window" buttons. 	"Your report will appear in a new window on the screen. If your report is long, you'll see a scroll bar to navigate through the data. To save your report, select 'Export.' You can download it as an Excel or CSV file. Select 'Close Window' to exit the report and return to your dashboard."	*Tip: Export as Excel or CSV*	• Call-outs around "Export" and "Close Window". • Fade transition to next scene
4.Method 2: The Reports tab [1:15-1:25]	Dashboard landing page. Simulate selecting "Reports" in left-hand menu with cursor. 	"You can also generate reports by selecting 'Reports' from the dashboard left-hand navigation menu."	*Method 2: The Reports Tab*	Simulate selecting "Reports" button with a cursor.

[1:25-1:50]	Reports landing page. Simulate selecting filters and selecting “Generate Report” with cursor. Full report appears.  	“From the Reports page, the process is the same - just select your filters and generate the report. Then, select Export to download and save your report as an Excel or CSV file. You can always create a new report by reselecting your filters and selecting ‘Generate Report’ again.”	None	• Simulate selecting dropdown menus and selections with Cursor • Simulate selecting “Generate Report” button with cursor • Call out around “Export” button
5. Report Preview [1:50-1:59]	An Excel version of a data report on a laptop screen. 	“No matter which method you choose, the result is the same - a clean, useful data sheet with everything you need to analyze, share, or take action.”	*Clean layout; actionable data*	• Slow zoom-in towards laptop screen • Circular pop-up shapes with text

6.Outro and Recap [1:59-2:25]	B-roll: Team reviewing reports. Team celebrating. Volunteers smiling. Dark Blue background with FinishLine logo and directive to Support website slides down.    	"Now you know how to generate and export a report using FinishLine CRM. With FinishLine, reporting is simple—so you can spend more time making an impact and less time managing spreadsheets."	Logo + Text: *Need help? Visit our Support Page.*	• Upbeat background music plays throughout • Subtle fade transitions between B-roll clips • Logo and website frame slides down after B-roll sequence • Fade-to-black exit