

Milestone 10 - Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Use Case:

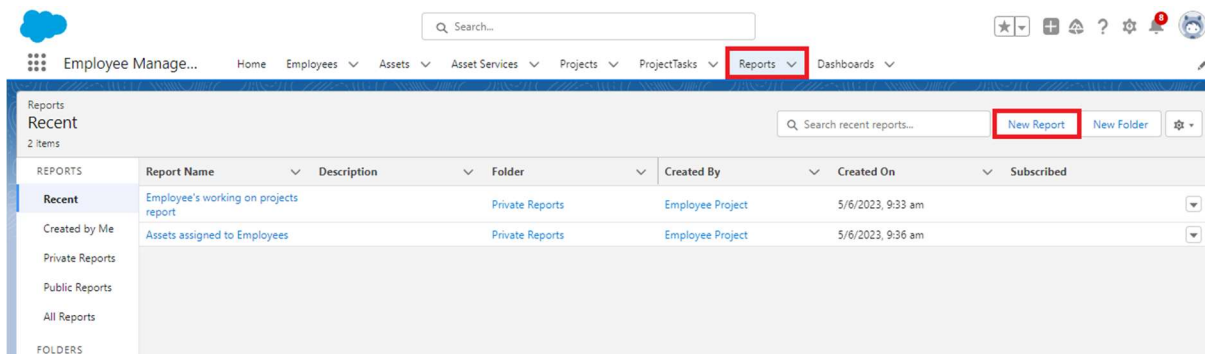
The CEO of an organization wants to have a brief data of all the 4 objects. So he can have a clear picture of his organization and be able to make any decisions required based on this data. So he calls you on this task and wants you to represent the data in an appropriate way.

Let's create a Report.

Activity 1

Create Report

1. Go to the app --> click on the reports tab
2. Click New Report.



The screenshot shows the Salesforce Reports interface. The top navigation bar includes a search bar and several icons. The 'Reports' tab is highlighted with a red box. Below the navigation bar, the 'Recent' reports section is displayed, showing a list of reports. The 'New Report' button is highlighted with a red box in the top right corner of the reports section.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on projects report		Private Reports	Employee Project	5/6/2023, 9:33 am	
Created by Me	Assets assigned to Employees		Private Reports	Employee Project	5/6/2023, 9:36 am	
Private Reports						
Public Reports						
All Reports						

3. Select report type from category or from report type panel or from search panel --> click on start report.

The screenshot shows the 'Create Report' interface. On the left is a 'Category' sidebar with options like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', 'Price Books, Products and Assets', and 'Administrative Reports'. The 'All' category is selected. The main panel is titled 'Select a Report Type' and contains a search bar with 'bookings' entered. Below the search bar is a table with two columns: 'Report Type Name' and 'Category'. The table lists three report types: 'Bookings', 'Bookings with Flight', and 'Bookings with Passenger Name', all categorized as 'Standard'. The 'Bookings with Flight' row is highlighted with a red box. To the right of the table is a 'Details' panel for the selected report type, 'Bookings with Flight'. It shows a 'Start Report' button, a 'Details' tab, and sections for 'Created By You' (No Reports Yet), 'Created By Others' (No Reports Yet), and 'Objects Used in Report Type' (Owner, r11444).

Report Type Name	Category
Bookings	Standard
Bookings with Flight	Standard
Bookings with Passenger Name	Standard

4. Customize your report

- Check the toggle on the update preview automatically button.
- Add fields from the left pane as shown below.
- Add the "Traveller" field in Group Rows.
- Turn the toggle off for the subtotal button.

Flight Management... Flights Passengers Crews Bookings Reports Dashboards Leaves

REPORT New Bookings with Flight Report Bookings with Flight

Update Preview Automatically

Travellers	Flight: PNR Number	Booking: Booking Id	Flight: Flight Name	Class	Departs From	Departs to	Passenger Name	Flight: Capacity	Flight: Arrival Time
Adult (2)	6,78,901	Bk-0001	Air India Express	Economy	Delhi	Bengaluru	P-0005	500	2:30 am
	6,78,901	Bk-0007	Air India Express	-	Delhi	Chennai	P-0004	500	2:30 am
Child (7)	6,78,901	Bk-0005	Air India Express	-	Kolkata	Delhi	P-0004	500	2:30 am
	6,78,901	Bk-0008	Air India Express	-	Delhi	Kolkata	P-0004	500	2:30 am
	6,78,901	Bk-0009	Air India Express	-	Delhi	Kolkata	P-0005	500	2:30 am
	6,78,901	Bk-0010	Air India Express	Business	Delhi	Kolkata	P-0004	500	2:30 am
	4,56,788	Bk-0002	Indigo	Business	Mumbai	Bengaluru	P-0006	500	2:00 am
	4,56,788	Bk-0004	Indigo	-	Chennai	Kolkata	P-0002	500	2:00 am
Infant (1)	1,23,456	Bk-0006	Flight Emirates	-	Delhi	Bengaluru	P-0002	500	2:00 am
	4,56,788	Bk-0003	Indigo	First Class	Bengaluru	Chennai	P-0003	500	2:00 am
Total (10)	12,59,145							1,500	

Row Counts Detail Rows Subtotals Grand Total

- Click on save.
- Save the report as "Bookings with Flight Details".

Save Report

* Report Name
Bookings with Flight Details

Report Unique Name
New_Bookings_with_Flight_Report_I29

Report Description

Folder
Private Reports

Cancel Save

- Click on Save.

Note: Reports may get varied from the above pictures as the data might be different.

Activity 2

1. Create a report with a report type: "Booking with Passenger Name".
2. Create a report with report type: "Crew with Flight".