

SALESFORCE DEVELOPER

PROJECT TITLE : WORKFORCE ADMINISTRATION SOLUTION

TEAM ID : NM2023TMID0250

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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

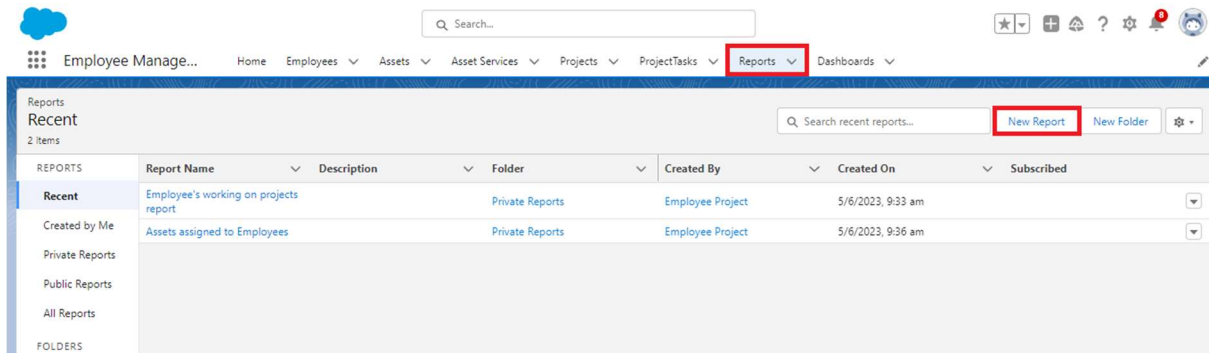
1. Tabular
2. Summary
3. Matrix
4. Joined Reports
5. Use Case:

The CEO of an organization wants to have a brief data on employees working, projects in take, project progress, Assets assigned, what are the conditions of the Assets assigned. 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.

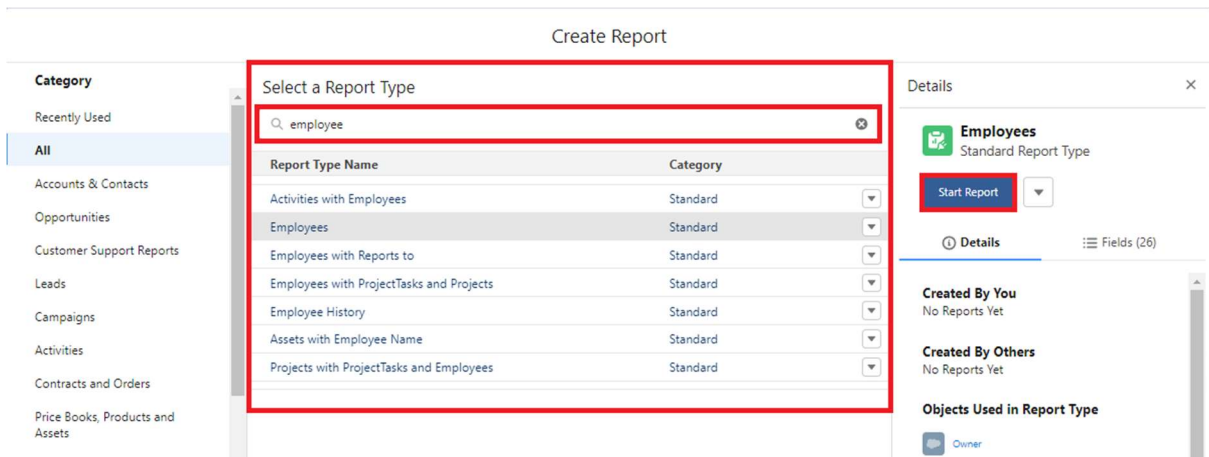
Let's create a Report.

Create Report

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



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



4. Customize your report

- Add fields from left pane as shown below

Employee Manage... Home Employees Assets Asset Services Projects ProjectTasks Reports Dashboards

REPORT New Employees Report Employees

Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything.

	Employee: Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Employee	a05500000-n170	-	-	-	-	http://https://linkedin.in
2	Emp for Jundien test	a05500000-n167	-	8:00 am	5:00 pm	-	https://linkedin.in

Update Preview Automatically

Fields

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Employee: Employee Name X

Employee ID X

Reports to X

Login Time X

Logout Time X

Mode of Work X

LinkedIn Profile X

5. Save or run it.