

SFC-MOD7-ASSIGNMENT-1

Tasks To Be Performed:

1. Create a tabular report for the Leads object.

GLAMAKE Home Employees Departments Devices Clubs Accounts New Courses Cases Reports

Report: Leads
New Leads Report

Enable Field Editing

Total Records: 28

	First Name	Last Name	Title	Company / Account	Email	Lead Source	Street	Rating	Lead Owner
1	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcof.net	Web	321 Westcott Building	Hot	SD R
2	Phyllis	Cotton	CFO	Abbott Insurance	pcotton@abbottins.net	Web	-	-	SD R
3	Jeff	Glimpse	SVP, Procurement	Jackson Controls	jeffg@jackson.com	Phone Inquiry	-	-	SD R
4	Mike	Braund	VP, Technology	Metropolitan Health Services	likeb@metro.com	Purchased List	-	-	SD R
5	Patricia	Feager	CEO	International Shipping Co.	patricia_feager@is.com	Partner Referral	-	-	SD R
6	Brenda	Mcclure	CFO	Cadinal Inc.	brenda@cardinal.net	Web	-	-	SD R
7	Violet	Macleod	VP, Finance	Emerson Transport	violetm@emersontransport.com	Phone Inquiry	-	-	SD R
8	Kathy	Snyder	Regional General Manager	TNR Corp.	ksnyder@tnr.net	Purchased List	-	-	SD R
9	Tom	James	SVP, Production	Delphi Chemicals	tom.james@delphi.chemicals.com	Web	-	-	SD R
10	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	shellyb@westerntelecom.com	Partner Referral	-	-	SD R
11	Pamela	Owenby	SVP, Technology	Hendrickson Trading	pam_owenby@hendricksontrading.com	Partner Referral	-	-	SD R
12	Norm	May	VP, Facilities	Greenwich Media	norm_may@greenwich.net	Web	-	-	SD R
13	Pat	Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.	pat@pyramid.net	Phone Inquiry	-	-	SD R
14	Andy	Young	SVP, Operations	Dickenson plc	a_young@dickenson.com	Purchased List	-	-	SD R
15	Kristen	Akin	Director, Warehouse Mgmt	Aethna Home Products	kakin@athenahome.com	Partner Referral	-	-	SD R

2. Create a summary report for the Opportunity object using the average function.

GLAMAKE Home Employees Departments Devices Clubs Accounts New Courses Cases Reports

REPORT
New Opportunities Report Opportunities

Search...

Save & Run Save Close Run

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

Update Preview Automatically

Stage

Id. Decision Makers
Proposal/Price Quote
Value Proposition

Record Count

4

Stage	Owner Role	Opportunity Owner	Account Name	Opportunity Name	Amount	Expected Revenue	Probability (%)	Age	Close Date
Value Proposition (1)	-	SD R	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	INR 250,000.00	INR 125,000.00	50%	41	9/2
Subtotal							Avg: 50%		
Id. Decision Makers (2)	-	SD R	GenePoint	GenePoint Lab Generators	INR 60,000.00	INR 36,000.00	60%	41	9/1
	-	SD R	Edge Communications	Edge Emergency Generator	INR 35,000.00	INR 21,000.00	60%	41	9/2
Subtotal							Avg: 60%		
Proposal/Price Quote (1)	-	SD R	United Oil & Gas Corp.	United Oil Refinery Generators	INR 270,000.00	INR 202,500.00	75%	41	9/
Subtotal							Avg: 75%		

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting Currency: INR

3. Create a matrix report for the Opportunity object with dimensions as Stage and Amount.

GLAMAKE

HomeEmployees▼Departments▼Devices▼Clubs▼Accounts▼New Courses▼Cases▼Reports▼

REPORT▼

New Opportunities Report

Opportunities

↶↷Add ChartSave & RunSave▼CloseRun

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

Update Preview Automatically

OutlineFilters

GROUP ROWS

Add group...

Amount

GROUP COLUMNS

Judd group...

Stage

AmountStageValue PropositionId. Decision MakersProposal/Price QuoteTotal

INR 35,000.00Average Probability (%)Record Count0%60%0%60%

INR 60,000.00Average Probability (%)Record Count0%60%0%60%

INR 250,000.00Average Probability (%)Record Count50%10%50%

INR 270,000.00Average Probability (%)Record Count0%0%75%75%

TotalAverage Probability (%)Record Count50%160%275%161%

Details (4 Rows)

Click an intersection in the table above to filter details.

Owner RoleOpportunity OwnerAccount NameOpportunity NameExpected RevenueProbability (%)AgeClose DateCreated DateNext Step

1-SD REdge CommunicationsEdge Emergency GeneratorINR 21,000.0060%419/29/20239/27/2023-

2-SD RGenePointGenePoint Lab GeneratorsINR 36,000.0060%419/17/20239/27/2023-

3-SD RGrand Hotels & Resorts LtdGrand Hotels Guest Portable GeneratorsINR 125,000.0050%419/23/20239/27/2023-

4-SD RUnited Oil & Gas Corp.United Oil Refinery GeneratorsINR 202,500.0075%419/8/20239/27/2023-

5Avg: 61%

Row CountsDetail RowsGrand TotalStacked Summaries

Conditional FormattingCurrency: INR

4. Create a joined report for Cases, Accounts, and Opportunity objects.

Joined Report
New Accounts Report

Type	Rating	Last Modified Date	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed	Owner Role	Opportunity Owner
1	-	9/27/2023	SD R	Edge Communications	Starting generator after electrical failure	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
2	Cold	9/27/2023	SD R	United Oil & Gas Corp.	Performance inadequate for second consecutive week	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
3	-	9/27/2023	SD R	United Oil & Gas Corp.	Seeking guidance on electrical wiring installation for GC5060	9/27/2023, 12:13 PM	986	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	SD R
4	-	9/27/2023	SD R	Express Logistics and Transport	Easy installation process	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
5	Hot	9/27/2023	SD R	Express Logistics and Transport	Maintenance guidelines for generator unclear	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
6	Warm	9/27/2023	SD R	Express Logistics and Transport	Electrical circuit malfunctioning	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
7	-	9/27/2023	SD R	GenePoint	Generator assembly instructions unclear	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
8	-	9/27/2023	SD R	Grand Hotels & Resorts Ltd	Structural breakdown of rotor assembly	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
9	Warm	9/27/2023	SD R	Grand Hotels & Resorts Ltd	Customer service for portable generators needs beefing up	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
10	Cold	9/27/2023	SD R	United Oil & Gas, UK	Mechanical maintenance guidelines for generator misleading	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
11	Warm	9/27/2023	SD R	United Oil & Gas, Singapore	Maintenance guidelines for generator unclear	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
12	Hot	9/27/2023	SD R	United Oil & Gas, Singapore	Electronic panel fitting loose	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	SD R
13	-	9/27/2023	SD R	University of Arizona	Repeated motor breakdown while shutting off	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	
14	Hot	10/18/2023	SD R	Grand Hotels & Resorts Ltd	Starting up generator consumes excessive power	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	
15	Hot	10/18/2023	SD R	Grand Hotels & Resorts Ltd	Delay in installation; spare parts unavailable	9/27/2023, 12:13 PM	-9,924	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	

5. Create a custom report type named Opportunity with the primary object as Opportunity, the secondary object as Cases, and the tertiary object as Email. Then, create a tabular report for the custom report type.

SETUP

Report Types

Custom Report Type

cAccounts and Cases

Help for this Page

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

Edit

Delete

Clone

Report Type Label	cAccounts and Cases	Report Type Category	Accounts & Contacts
Report Type Name	cOpportunity_and_Cases	Deployment Status	Deployed
Description	Report created on Accounts and cases		
Created By	SD_R 11/7/2023, 11:57 AM	Modified By	SD_R 11/7/2023, 12:04 PM

Object Relationships

Edit

Object Relationships Help

Accounts (A)

- with at least one related record from Cases (B)
- with at least one related record from Emails (C)

Report: cAccounts and Cases

Copy of New cAccounts and Cases Report

Enable Field Editing

Search

Add Chart

Filter

Edit

Total Records

26

	Account Name	Case Number
1	Edge Communications	00001000
2	United Oil & Gas Corp.	00001001
3	United Oil & Gas Corp.	00001002
4	Express Logistics and Transport	00001003
5	Express Logistics and Transport	00001004
6	Express Logistics and Transport	00001005
7	GenePoint	00001006
8	Grand Hotels & Resorts Ltd	00001007
9	Grand Hotels & Resorts Ltd	00001008
10	United Oil & Gas, UK	00001009
11	United Oil & Gas, Singapore	00001010
12	United Oil & Gas, Singapore	00001011
13	University of Arizona	00001012
14	Grand Hotels & Resorts Ltd	00001013
15	Grand Hotels & Resorts Ltd	00001014

5. Create a dashboard for all the reports that you created.

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Home

Employees

Departments

Devices

Clubs

Accounts

New Courses

Cases

Reports

Dashboards

Search...

Performance Data

+ Component

+ Filter

Save

Done

Copy of New cAccounts and Cases Report

Account Name	Case Number
Burlington Textiles Corp of America	00001019
Burlington Textiles Corp of America	00001020
Edge Communications	00001000
Edge Communications	00001017
Edge Communications	00001018
Express Logistics and Transport	00001003
Express Logistics and Transport	00001004

New Opportunities Report

Record Count

New Leads Report

Firs--	Las--	Title	Company / Account	Email
-	[not provided]	-	[not provided]	-
Andy	Youn	SVP, Operations	Dickenson plc	a_young@dickenson.co
Bert	Boxe	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcf.net
Betty	Bair	VP, Administration	American Banking Corp.	bbblair@abankingco.com