Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

1. Create a report that displays rating of the account and which has type and account name.

2. Click on app launcher search for reports.

3. Click the report type as Sales order with customer Click Start report.

4. Customize your report, in group rows select - Customer Account Name

5. Click refresh

6. Click save and run

7. Give report name – New Sales orders with Customer Report

8. Click Save