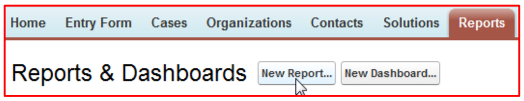
Reports

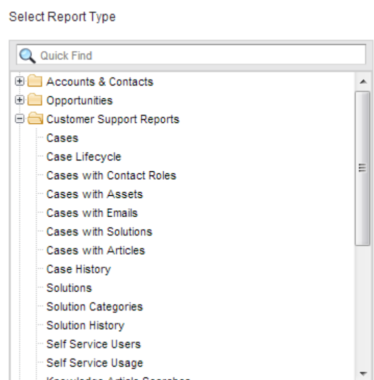
This document provides basic instruction on modifying / creating reports. For more information on building and maintaining reports, see the Salesforce Trailhead training:
https://trailhead.salesforce.com/en/modules/reports_dashboards

Creating a New Custom Report

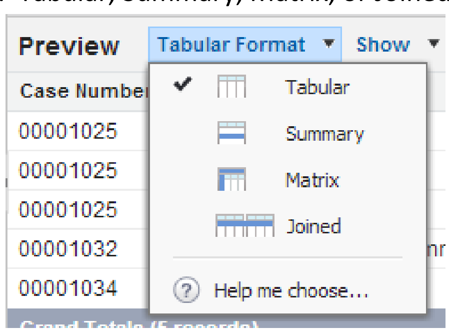
1. Click on the 'Reports' tab.
2. Click 'New Report'.



3. Next, expand the category selections and select the Report Type based on the type of data you need to include in your report, next click 'Create'.



4. Next, define all of the report parameters. As you modify the report parameters a preview of your report results will be displayed using live data. Follow the steps below:
   a. Define type of report: Tabular, Summary, Matrix, or Joined



   b. If necessary, change the Show filter to 'Details'.
   c. Define the columns to display in report results: drag and drop fields from the Fields left panel into the preview window and move columns you don't want to display from the preview screen to the left panel.

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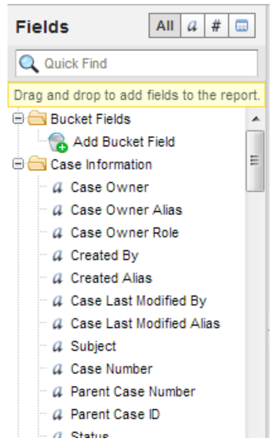
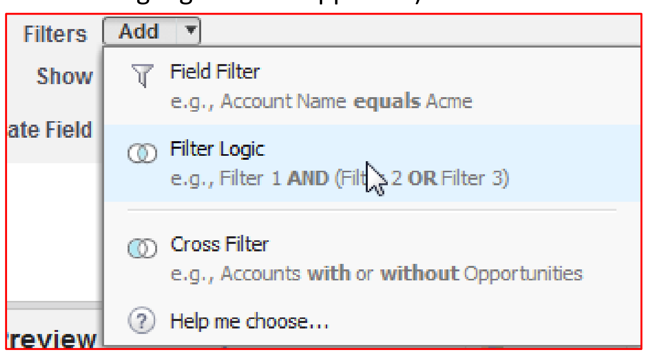
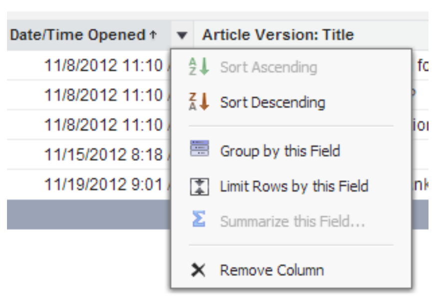
June,2017



d. Organize columns: click on column headers and drag and drop to reorder the columns.

e. Sort columns: click on a column header to see available options for sorting values in ascending or descending order. Note that only one column can be sorted at a time (multi-column sorting logic is not supported)



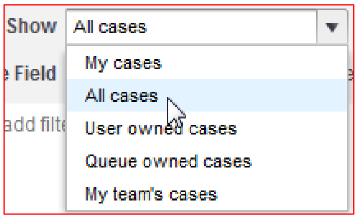


f. Create summary levels (for Summary reports): from the Fields left panel, drag-and-drop a field into the area labeled ‘Drop a field here to create a grouping’. Up to 3 groupings or summary levels can be added to Summary Reports.

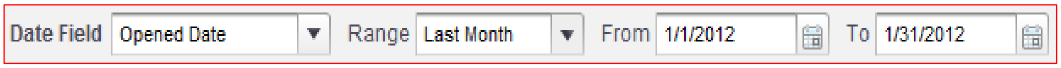
g.

Modify the default ‘View’ and ‘Timeframe’ filters:

   i. Change the view from ‘My [records]’ to ‘All [records]



ii. Modify the timeframe as necessary by selecting a date field and define the Range, From, and/or To fields as necessary. If timeframe should not be used as a parameter then just delete out the values in the From and To fields

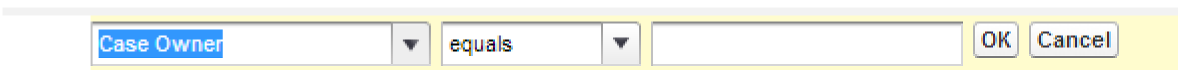


h. Define custom filters

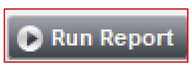
i. Next to Filters, click on the Add button

ii. Enter the criteria for the filter and click 'OK'

iii. If more than one filter is used, the system assumes the logic is filtered based on [Filter 1] AND [Filter 2] AND [Filter 3], etc. To customize this logic (i.e. modify to [Filter 1] OR [Filter 2] OR [Filter 3]), then click the Add button's dropdown list and select 'Filter Logic'.



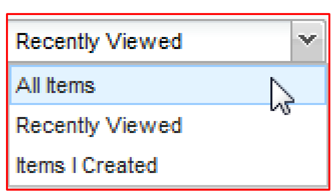
5. Click 'Run Report'.



6. Click 'Save As'.
7. Complete the fields to save the report. Reports saved in the My Personal Custom Reports folder can only be accessed by you. Click 'Save'.

Customizing an Existing Report

1. Click the 'Reports' tab.
2. Navigate to the report folder where the report is located (be sure that the filter in the upper right pane is set to 'All Items':

a. 

3. From the list of available reports click the link for the desired report.
4. Click 'Customize'.

5. Modify the report as necessary *(see Creating a New Custom Report below for specifics)*
    a. To edit the filters, click the Edit link next to the filter
    b. To add/remove fields, drag and drop the fields in/out the report
6. Click 'Run Report'.
7. 

   Click 'Save As'.
8. Complete the fields to save the report. Reports saved in the My Personal Custom Reports folder can only be accessed by you. (To share the report with others, save it in a shared, folder.
9. Click 'Save'.