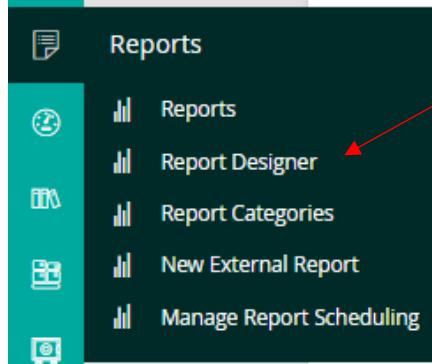


Steps To Create: Report

Step 1: Go to Report icon and click on Report Designer tab.



Step 2: This will redirect to the 1st page of Report designer.

A screenshot of the 'Report Designer' interface. On the left, a vertical sidebar lists three steps: 'Create' (selected), 'Define', and 'Filter'. The main area is titled 'Name Your Report' and contains fields for 'Report Name' (Test Report), 'Add in Category' (Saksham Reports), 'Description' (About the Report**), and 'Report Help'. Below this, the 'Select report source' section shows 'Type' set to 'Lead Reports' and 'View' set to 'Leads With Contacts'. A preview table displays four rows of lead data: Test Lead, Celestes, and Magnus.

- 1st page is to Create the Report which includes naming the report, choosing the data source for it, and selecting the people who can view it, etc.
- You can name the Report in Report name section, Select the category of the report in the drop-down menu. The brief about the report in Description section. Also, select the type of report out of 3 given options.
- Now coming to the Report source, we'll select the type of report in the dropdown menu, and select the required view in the selected report type.

Name	StatusCode	Owner	Stage
Test Lead	New	Rajesh	5
Celestes	New	Ramesh	2
Magnus	New	Suresh	3

Configure Report Visibility:

Visible To Everyone in my company can see this report
 Selected users, teams and roles can see this report

Visibility Period From To

Scope

Impersonation To

Report Run Automatically

Add to My Favorites

Is Paging On

Is Mobile Report

[Previous](#) [Next](#) [Finish](#) [Cancel](#)

- Now coming to Configuration of report visibility, we have 2 options. Select the first option if one has to keep the report visible to everyone, else select the second option in which we can limit the visibility to defined set of employees.
- We may also define the visibility period, by mentioning the start date and the end date.
- Now, in scope we can select any of the given 5 options (i.e. None, All, Team, Subordinate & individual)
- You may also select if the report should execute automatically or not by checking the option, as well as may turn the paging off or on based on one's need.
- Click on mobile Report check to make it visible in mobile configuration.

Step 3: Click on 'Next' button to define the report.

Image
 HTML Content
 Computed Field

Add Graph Remove Graph Add Header Add Footer Apply Conditional Highlighting Customize Color Preview
 Is Hide Details Show in Mailing List Target Email Field Target Mobile Field Show In Template
 Apply Aggregation In DB

Report

Lead First Name Edit Sorting Aggregate Highlight Link Report
 Remove All Fields
 Show Grand Summary

[Previous](#) [Next](#) [Finish](#) [Cancel](#)

- 2nd page is to select fields from left pane to view in report and add style to the report.

- In this, we'll select the field required by (cntrl+F) and then searching for the required fields to field.
- You may also check the Grand summary to see the total records of the report.

Step 4: Click on 'Next' button to define the report.

Test Report: Status: Under Construction

Set Report Filters: [Preview](#) [New Filter](#)

Column	Operation	Value
Lead Source	Equals	Prospecting
-Select-		

To create complex filters (using OR,Groups,etc) [Click Here](#) Is Advanced Filter

Report Constraint Filters: [Advance Territory Filter](#) [Google map settings](#)

Report display filters: Report parameters for linking:

- The final page is to add filters, to filter the large data and change the display filter labels.
- Set the Filter condition to get only the filtered records in the report
- Constraint filter is used to filter records by any set of restrictions.
- Report display filter is used to add the filters which is visible in the report to filter the data based on selected filter condition type.
- Click Finish to create the Report.

Steps: Provide Roles to User

Step 1: Go to Administrative Settings and go to User management menu.

User Name	Title	Phone	Email	Is Active
Prithviraj	Not Specified	Not Specified	prithviraj@solotours.co.in	✓
A N Krishna Kumar	Sr. Consultant	Not Specified	a.n.krishnakumar@crmnex.in	✗
Aadiya Mudhatkal	Consultant	Not Specified	aadiya.mudhatkal@crmnex.in	✓
Aakarsha Uretyay	Engineer	Not Specified	aakarsha.uretyay@crmnex.in	✓
Aakash	Jr.Engineer	Not Specified	Aakash@crmnex.in	✗
Aakash Wala	Engineer	Not Specified	akash.wala@crmnex.in	✓
Aalekh Agarwal	Intern	Not Specified	aalekh.agarwal@crmnex.in	✓
Aarti Rane	Sr. Engineer	Not Specified	aarti.rane@crmnex.in	✓
Aashish Tyagi	Engineer	Not Specified	Aashish.tyagi@crmnex.in	✗
Aayush Srivastava	Business Analyst	Not Specified	Aayush.srivastava@crmnex.in	✓
Aayushi Ajmera	Intern	Not Specified	aayushi.ajmera@crmnex.in	✗

Step 2: Click on the Filter and select the name or EC, using the operator to find the required user.

Filters

Employee Code	Operator	
Name	Like	Prithviraj
Email	Operator	
Mobile	Operator	
Login Id	Operator	
Employee No	Operator	

Apply Clear

Step 3: Go to Tab-3 (Access Permission)

Employee

Home > Edit

Basic User Scope Access Permission Travel Desk Exit Health Insurance Tag Others

Roles Search

You can drag the options in the right box up and down through mouse.

Step 4: Select the roles you want to give the user and double click the role to select it to assign the current user.

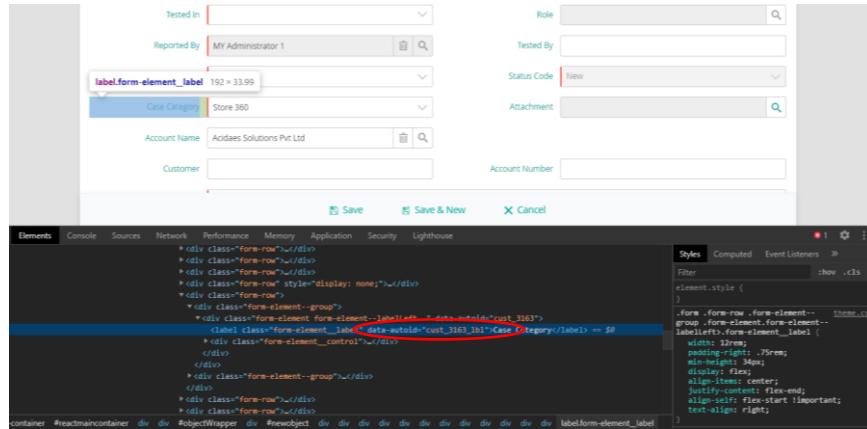
Step 5: Save the changes.

Steps: To Add a Value in a Layout

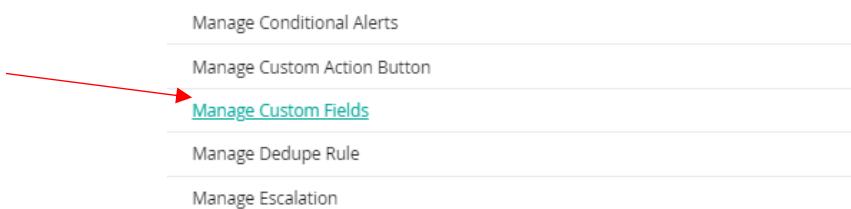
Step 1: Go to the layout page.



Step 2: Inspect the field in which the new value is to be added .



Step 3: Now copy the field id and search it in the filter in the custom field of required object.

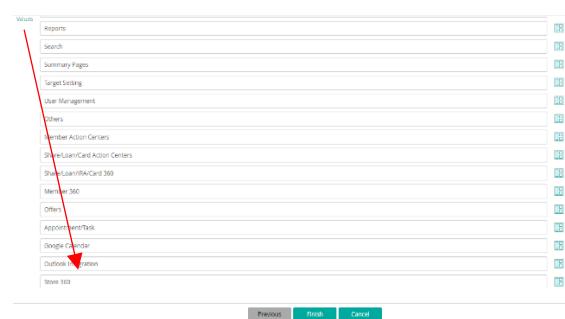


Step 4: Now click on the edit.

View	Custom Field	All Fields	All	Filter	
Drag a column header here to group by that column.					
Created By	Created On	Default Value	Description	Field ID	Internal Label
Nabha Kumar	12/09/2018	Not Specified	for First Bank (U.S)	3163	Case Category

Showing 1-1 Records

Step 5: Add the required new value and save it.



Steps: To Grant Access to Views & Reports

View Access:

Step 1: Go to required object, let say Project object.

Step 2: Scroll down to views and click on manage views.

Step 3: Search for the required view, (eg. RGCU), click on 3 dots to edit the view.

Step 4: Scroll down to view visibility -> Add the user.

Step 5: Save the view.

Report Access:

Step 1: Go to required Report object.

Step 2: Search the required report.

Step 3: Click on 3 dots to edit the Report. (Let's say RGCU report)

Step 4: Scroll down to Visible to -> Add the user .

Step 5: Save the view.