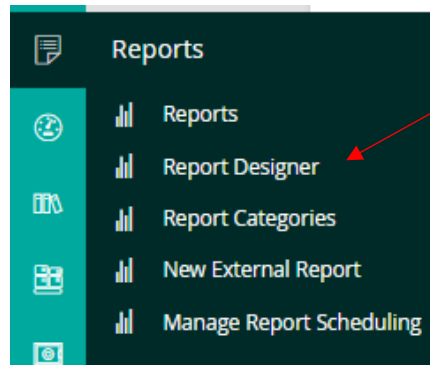


## Steps To Create: Report

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



**Step 2:** This will redirect to the 1<sup>st</sup> page of Report designer.

3 steps to go

- 1 Create**  
Start by naming your report, choosing the data source for it and selecting the people who can view it.  
Time estimate: 2 min
- 2 Define**  
Selecting fields from left pane to view in report and add style to the report.  
Time estimate: 2 min
- 3 Filter**  
Add filters to filter the large data and change the display filter labels.  
Time estimate: 2 min

**Name Your Report:**

Report Name:

Add in Category:

Description:   
238 characters left

Report Help:   
500 characters left

Type: ☒ Tabular ☐ Matrix ☐ Template

**Select report source:**

Type:

View:

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

Configure Report Visibility:

- 1<sup>st</sup> 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	StausCode	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

**Fields**

- Lead Amount ( INR )
- Lead Campaign Name
- Lead Comments
- Lead Company
- Lead Count
- Lead Employee Count
- Lead **First** Activity On
- Lead **First** Name
- Lead Id

**Report**

Lead First Name Edit

- Sorting
- Aggregate
- Highlight
- Link Report

Remove All Fields

Show Grand Summary

Previous Next Finish Cancel

- 2<sup>nd</sup> 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

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► Set Report Filters: [Preview](#)

---

[New Filter](#)

Column	Operation	Value
Lead Source ▼	Equals ▼	Prospecting <span style="float: right;">🗑 or 👤 🗑</span>
-Select- ▼		
-Select- ▼		
-Select- ▼		
-Select- ▼		
-Select- ▼		

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

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► Report Constraint Filters:

[Advance Territory Filter](#)  
[Google map settings](#)

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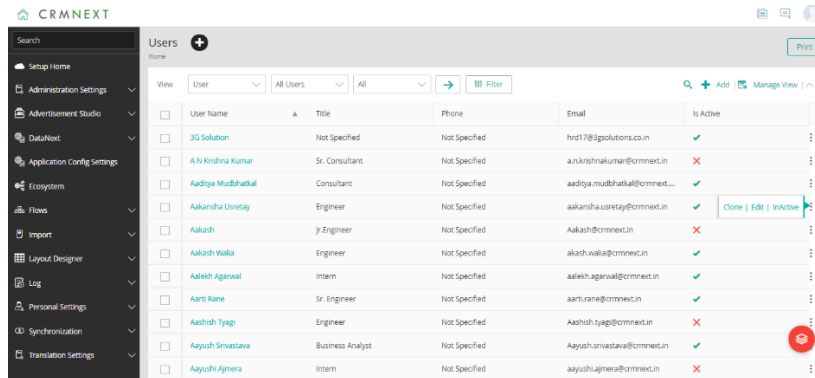
Report display filters: Report parameters for linking:

---

- 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.



**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 Prithwin

Email Operator

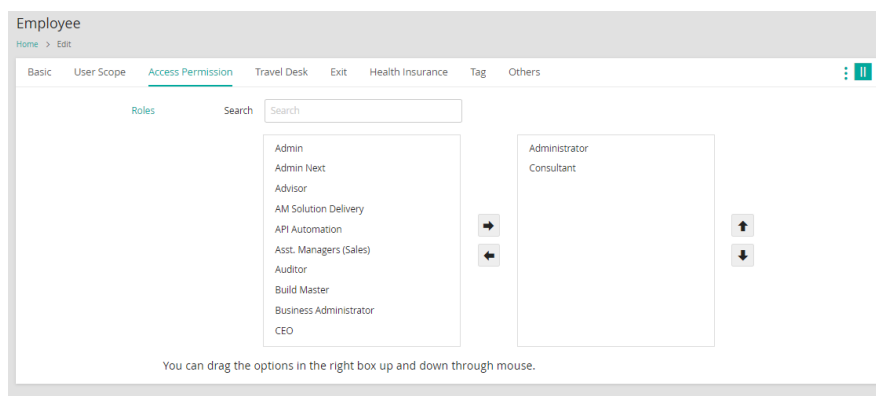
Mobile Operator

Login Id Operator

Employee No Operator

Apply Clear

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



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

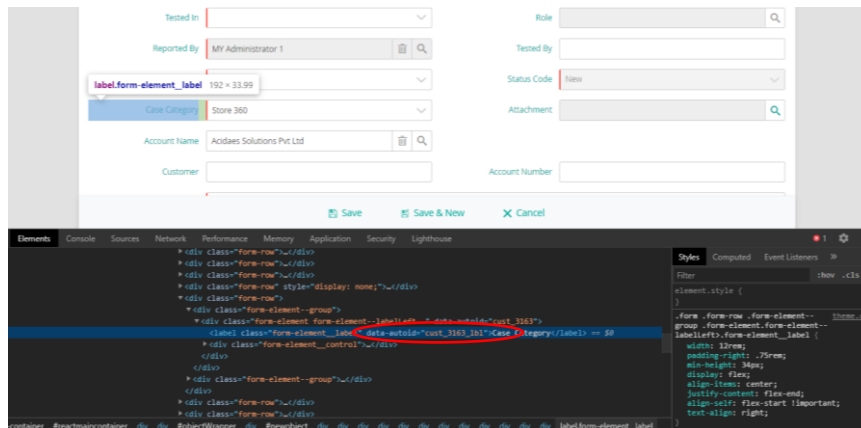
**Step 5:** Save the changes.

## Steps: To Add a Value in a Layout

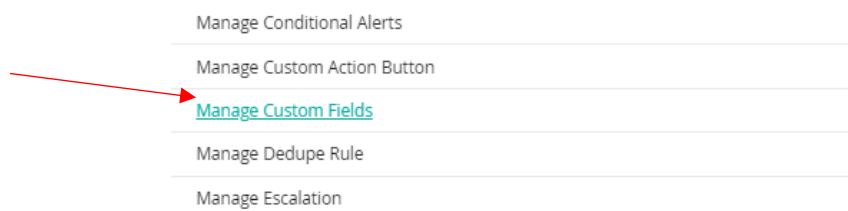
**Step 1:** Go to the layout page.

Case Category Store 360

**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

Created By	Created On	Default Value	Description	Field ID	Internal Label	Label
Nabha Kumar	12/09/2018	Not Specified	for First Bank (US)	3163	Case Categ	<span>edit</span> <span>delete</span> <span>add</span>

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.