

Reports

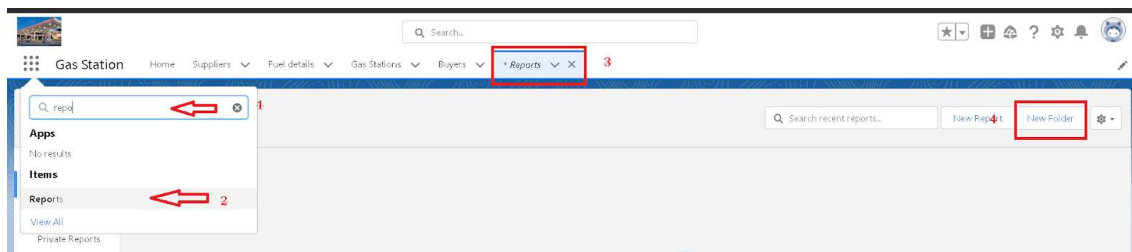
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.



3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
4. Click save.

Create folder

* Folder Label

Garage Management Folder

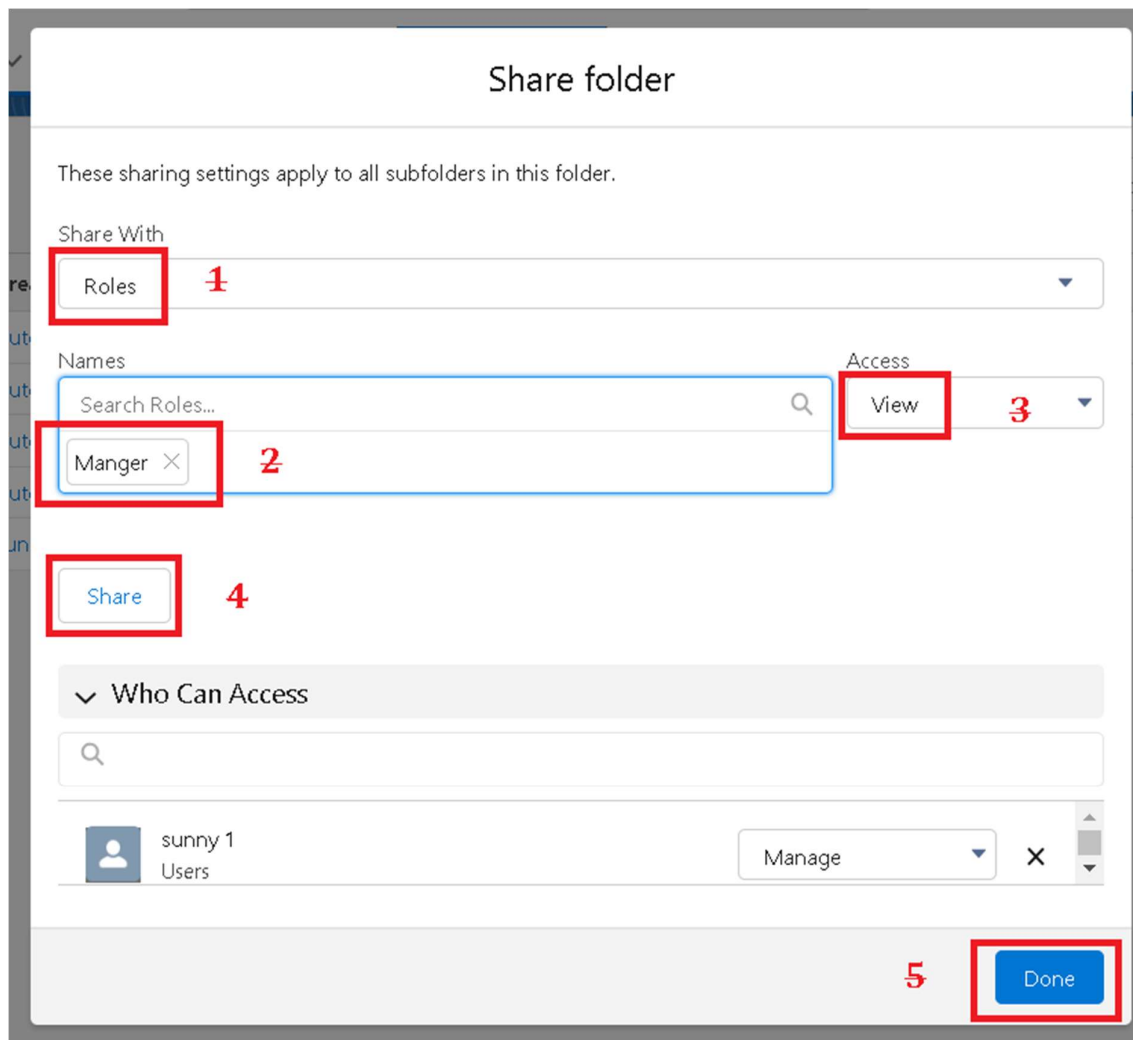
* Folder Unique Name

GarageManagementFolder

Cancel Save

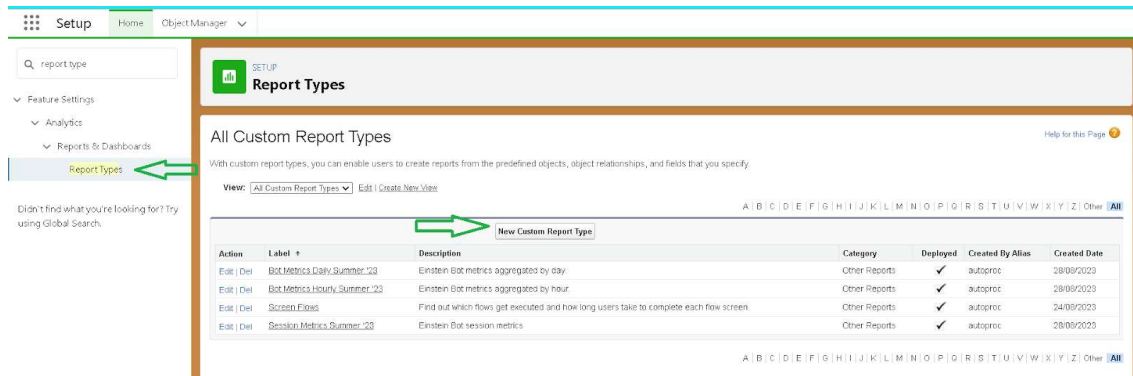
Sharing a report folder

1. Go to the app >> click on the reports tab.
2. Click on the All folder , click on the Drop down arrow for Garage Management folder, and Click on share.
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.



Create Report Type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.



3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Deployed ”, click on Next.

Report Types

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service_information

Description: Service information

Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☒ Deployed

Next Cancel

9. now , Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig.

New Custom Report Type
Service information Help for this Page

Step 2. Define Report Records Set Step 2 of 2

Previous Save Cancel

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details
Primary Object

B --Select Object-- X

Activities
Appointments
Duplicate Record Items

at one related "B" record.
related "B" records.

Previous Save Cancel

Step 2. Define Report Records Set

This report type will generate reports about Customer Details. You may define which related records from other objects are

A Customer Details
Primary Object

B Appointments X

A to B Relationship:

☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

(Click to relate another object)

11. Again Click to relate another object.
12. And select the related object as " service records".
13. Repeat the process and select the related object as " Billing details and feedback".
14. And click on save.

Report Types

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details
Primary Object

B Appointments
A to B Relationship:
☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

C Service records
B to C Relationship:
☒ Each "B" record must have at least one related "C" record.
☐ "B" records may or may not have related "C" records.

D Billing details and feedback
C to D Relationship:
☒ Each "C" record must have at least one related "D" record.
☐ "C" records may or may not have related "D" records.

Object Limit Reached
You can associate up to four objects to a custom report type.

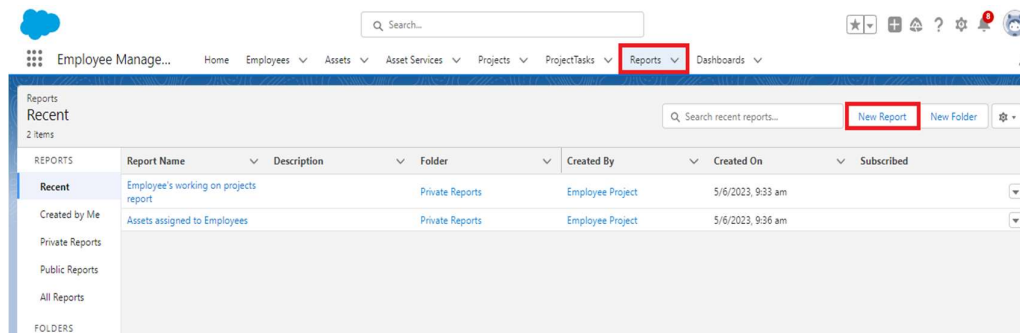
Previous Save Cancel

Create Report

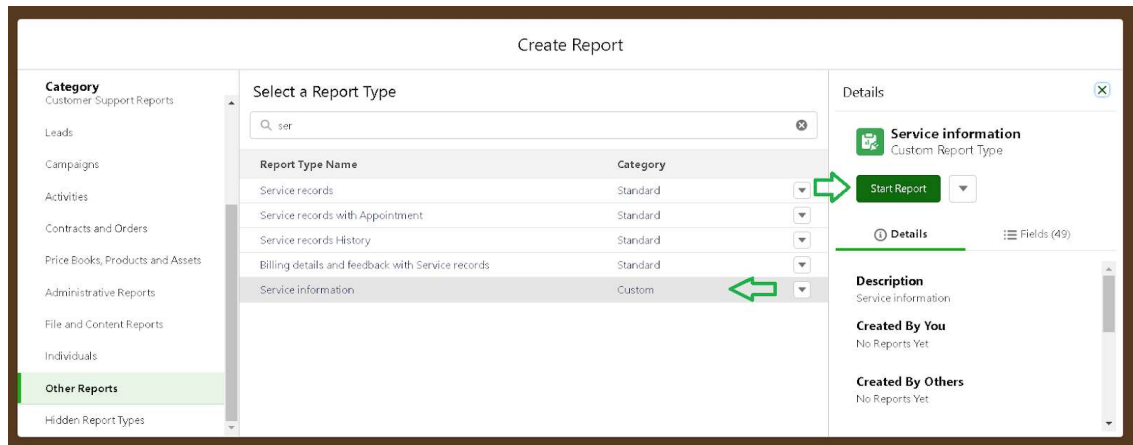
Note : Before creating report, create latest "10" records in every object.

Try to fill every field in each record for better experience.

1. Go to the app >> click on the reports tab
2. Click New Report.



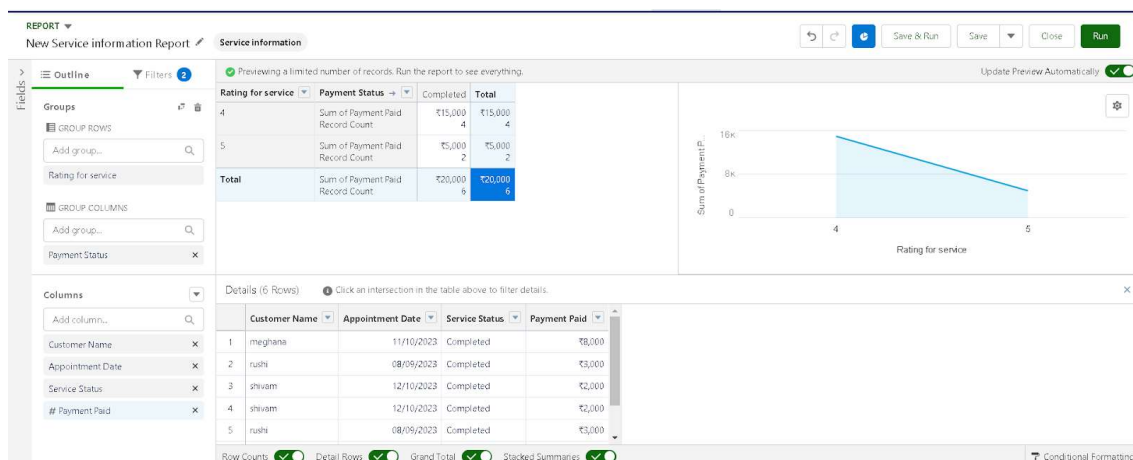
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.



4. Their outline pane is opened already, select the fields that mentioned below in column section.

 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid

5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
- . Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
- . Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.



Save Report

* Report Name

New Service information Report



Report Unique Name ⓘ

New_Service_information_Report_oVu

Report Description

Folder

Garage Management Folder



Select Folder

Cancel Save