1. [Create Reports and Dashboards for Sales and Marketing Managers]
2. [Create a Simple Custom Report]

Create a Simple Custom Report

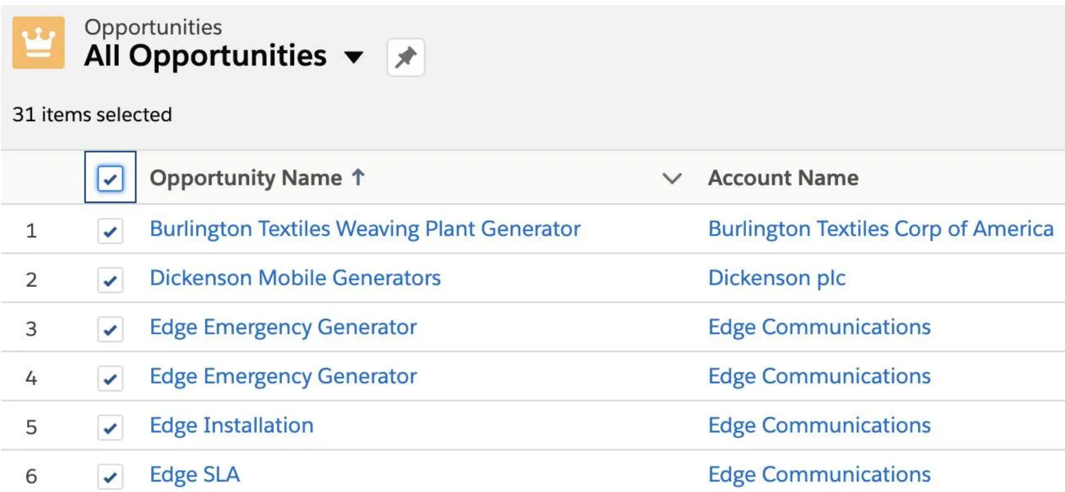
Adjust Settings

Before creating the first report, you'll need to associate the role of CEO with your profile so all report data is viewable.

1. Click **Setup** and select **Setup**.
2. Enter `Users` in Quick Find and select **Users**.
3. Click **Edit** next to your name and change Role to **CEO**.
4. Click **Save**.

Next, edit the Close Dates for all of the existing opportunities. This is done so the correct data appears when you run the current fiscal quarter report later in this project.

1. Click the **App Launcher** and select the **Sales**.
2. Click the **Opportunities** tab.
3. Click **Recently Viewed** and select the **All Opportunities** list view.
4. Select the **checkbox** to the left of Opportunity Name to select all opportunities.

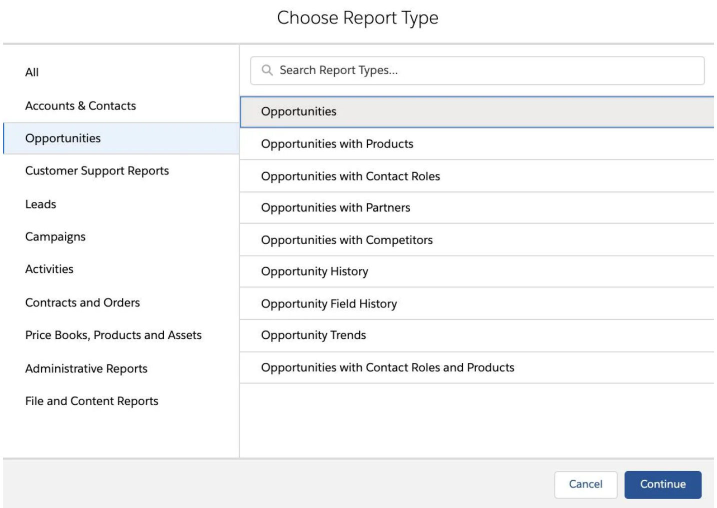


5. With all opportunities selected, rollover the Close Date for one of the opportunities and click the **pencil icon**.
6. Type in today's date.
7. Select the **checkbox** to Update 31 selected items.
8. Click **Apply**.
   Note: All of the opportunities should now have today's date as their Close Date.
9. Click **Save** at the bottom of the screen.

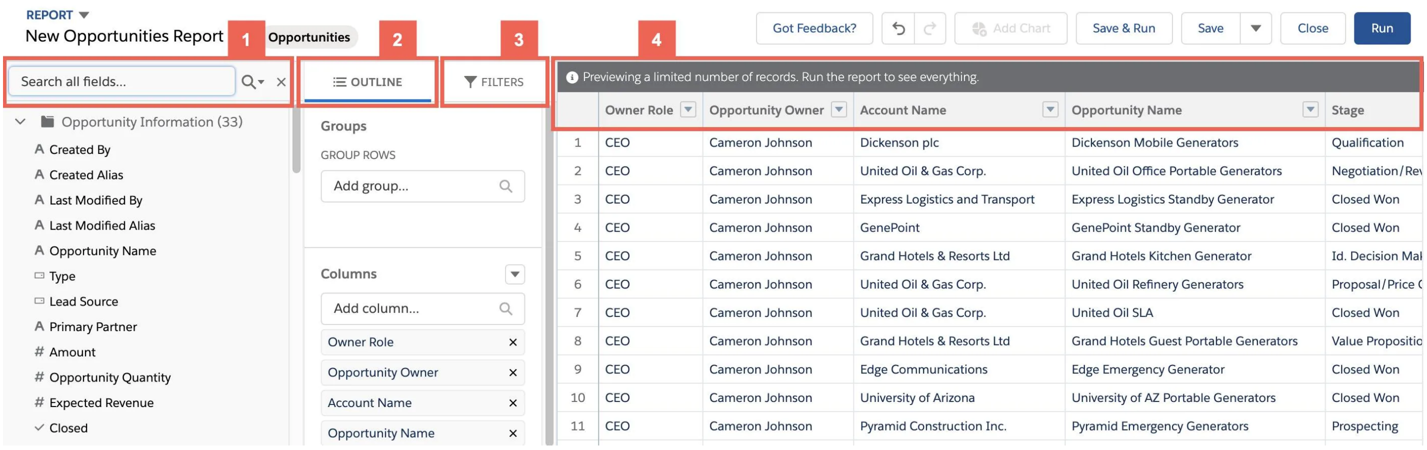
Create a Summary Report

Time to create a new opportunity report.

1. Click the **Reports** tab.
2. Click **New Report**.
3. In the Choose Report Type list, click **Opportunities**, then select **Opportunities** from the list that appears.
4. Click **Continue**.



Next, you'll use the Lightning Report Builder—a visual editor for reports. The report builder screen lets you work with report fields and filters, and shows you a preview of your report with just some of the data.



- The **Fields** pane **(1)** displays fields from the selected report type, organized by folder. Find the fields you want using the Quick Find box and field type filters, then drag them into the Outline pane or double click them to add them to your report.
- The **Outline** pane **(2)** makes adding, removing and arranging columns a breeze with a simple drag and drop feature. You can also add Bucket Columns and Summary Formula Columns in the Outline pane.
- The **Filters** pane **(3)** allows you to set the view, time frame, and custom filters to limit the data shown in a report.
- The **Preview (4)** offers a dynamic preview that makes it easy for you to customize your report. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks. The preview shows only a limited number of records. Run the report to see all your results.

Set the scope of the report using the standard filters.

1. Click the **Filters** pane.
2. Ensure Close Date is set to **Current FQ**.
3. Click **Opportunity Status** and select **Open** and click **Apply**.

Change the report columns as required.

1. Click the **Outline** pane and click the **X** next to the following column headers to remove them:
   - Owner Role
   - Fiscal Period

    - Age
    - Created Date
    - Next Step
    - Lead Source
    - Type

2. In the Preview pane, click the **arrow** next to the **Opportunity Owner** column heading and then select **Group Rows by This Field**.

Add a summary field.

1. Click the **arrow** next to the **Amount** column heading.
2. Select **Summarize**.
3. Click **Sum**.

Save the report as Opportunities by Rep in the Global Sales Reports folder.

1. Click **Save & Run**, and then complete the Save Report details:
    - Report Name: `Opportunities by Rep`
    - Click in the Report Unique Name text box to auto-populate the unique name. Don't worry, the unique name of this report isn't checked.
    - Report Description: `What opportunities do reps have in the pipeline?`
2. Click **Select Folder,** choose **Global Sales Reports**, and click **Select Folder**.
3. Click **Save**.

Assessment Complete!

+100 points

Create Reports and Dashboards for Sales and Marketing Managers
100%
Progress: 100%
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