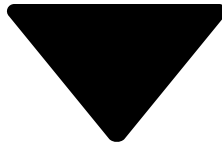


1. [Create Reports and Dashboards for Sales and Marketing Managers](#)



2. [Filter Your Reports](#)

Filter Your Reports

Use Report Filters

You can add up to 20 additional filters to a report directly in the Filters pane using the Add button or by dragging in fields from the Preview pane. In addition, you can also use filter logic using “and,” “or,” and “not” operators. Let’s meet the needs of your next stakeholder, the VP of Marketing, to see how filters and filter logic work.

He would like to see a list of all customer accounts based in Texas, North Carolina, Illinois, and New York that have either a rating of Hot or Warm or an annual revenue over \$2 million.

Create a new account report.

1. Click the **Reports** tab.
2. Click **New Report**.
3. In the Choose Report Type list, click **All**, and then select **Accounts** from the list that appears.
4. Click **Continue**.
5. Click the **Filters** pane.
6. Click **Show Me** and select **All accounts**, then click **Apply**.
7. Click **Created Date**, select **All Time** from the Range picklist, then click **Apply**.
8. Click the **Outline** pane and select the **X** next to the following fields to remove those columns from the report:
 - **Last Activity**
 - **Last Modified Date**

9. Click the **Fields** pane to expand the list of fields.

The screenshot shows the Salesforce Reports interface. At the top, it says 'REPORT' with a dropdown arrow, followed by 'New Accounts Report' and a pencil icon, and a 'Got Feedback?' button. Below this, there are two tabs: 'OUTLINE' and 'FILTERS'. The 'FIELDS' pane is expanded on the left, showing a search bar and a list of fields. The main preview area shows a table of account records with columns: Account Owner, Account Name, Billing State/Province, Type, and Rating. The table contains three rows of data.

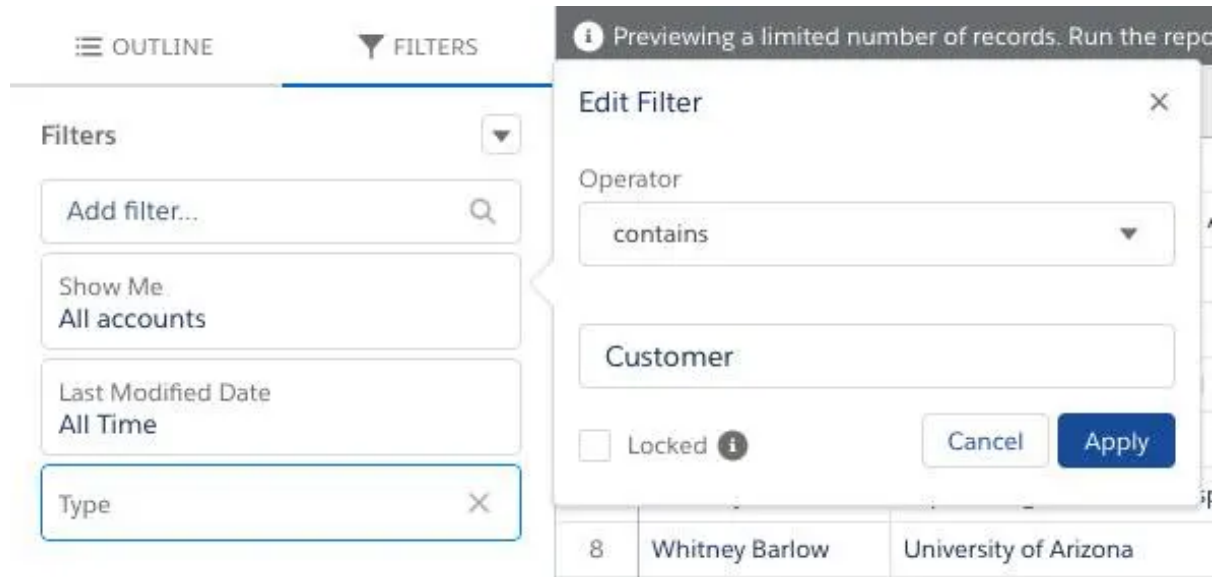
	Account Owner	Account Name	Billing State/Province	Type	Rating
1	Cameron Johnson	Edge Communications	TX	Customer - Direct	Hot
2	Cameron Johnson	Burlington Textiles Corp of America	NC	Customer - Direct	Warm
3	Cameron Johnson	Pyramid Construction Inc.	-	Customer - Channel	-

10. Double-click **Annual Revenue** to add it to the report.
11. Click the **X** to close the Fields pane.

- Click and drag the Annual Revenue column so it is placed between the Account Name and Billing State/Province columns.

Add the necessary filters and filter logic.

- Click the **Filters** pane.
- Search for **Type** in Add filter.. and select it.
- In the Operator field, select **contains** from the drop-down menu.
- Type **Customer** in the value field.
- Click **Apply**.

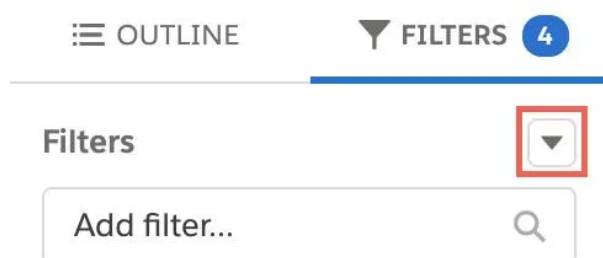


- Repeat steps 2-5 above to create the following three additional filters:

Field	Operator	Value
Billing State/Province	equals	TX, NC, IL, NY
Rating	equals	Hot, Warm
Annual Revenue	greater or equal	2000000

Note: Annual revenue is two million (six zeros).

- In the Filters pane, click the **arrow** next to Filters and click **Add Filter Logic**.



- In the Edit Filter Logic field, change the logic to **1 AND 2 AND (3 OR 4)** and click **Apply**.

Save the report as Central and Eastern Target Accounts in the Marketing Reports folder:

- Click **Save & Run**, and then complete the Save Report details:
 - For Report Name: **Central and Eastern Target Accounts**

- 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.
- For Report Description: **Who are our important customers in the Central and Eastern states?**

2. Click **Select Folder**, select **Marketing Reports** from the Global Sales Reports folder and click **Select Folder**.

3. Click **Save**.

<div>Report: Accounts</div> <div>Central and Eastern Target Accounts</div> <div>Who are our important customers in the Central and Eastern states?</div>						
Total Records		Total Annual Revenue				
4		\$6,589,000,000				
	Account Owner	Account Name	Annual Revenue	Billing State/Province	Type	Rating
1	Cameron Johnson	Edge Communications	\$139,000,000	TX	Customer - Direct	Hot
2	Cameron Johnson	Burlington Textiles Corp of America	\$350,000,000	NC	Customer - Direct	Warm
3	Cameron Johnson	Grand Hotels & Resorts Ltd	\$500,000,000	IL	Customer - Direct	Warm
4	Cameron Johnson	United Oil & Gas Corp.	\$5,600,000,000	NY	Customer - Direct	Hot
5			\$6,589,000,000			

Use Relative Dates

Instead of filtering data by calendar dates, such as Close Date > Jan 1, 2020, filter your report by a relative date: Close Date = THIS YEAR. Yes, Salesforce will understand this value!

Our CEO is very focused on user adoption of Salesforce and wants to ensure the company is getting the most out of its user licenses. He wants a weekly report of all users who have not logged into Salesforce in the last seven days as well as when their login access is set to expire. How would you accomplish this?

Customize the Users Report Type to display users who have not logged in during the last seven days:

1. Click the **Reports** tab.
2. Click **New Report**.
3. Enter **Users** in the search box and select **Users**.
4. Click **Continue**.
5. Click the **Outline** panel.
6. In the Add column... search box, enter **login access**, and then select **Login Access Exp. Date**.
7. Click the **Filters** pane.
8. Click the **Last Login Filter**.
9. Under Date, click **Last Login** and select **Login Access Exp. Date** from the dropdown list.
10. Leave Range as All Time and click **Apply**.
11. In the Add filter... search box, enter **Last Login**, then select **Last Login**.
12. Create the filter with these details:
 - For operator, select **not equal to**
 - Click **Use relative date** and enter **Last 7 days**
 - Click **Apply**

Edit Filter

×

Operator

not equal to

Relative Date

Use calendar date

LAST 7 DAYS

Enter a relative date, like YESTERDAY, LAST WEEK, or NEXT 30 DAYS. For a list of supported values, see the Salesforce help.

☐ Locked ⓘ

Cancel

Apply

13. Click **Save & Run**.

14. For Report Name, enter **Users Not Logged in Last 7 Days**.

15. 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.

16. For Report Description, enter **Who hasn't logged in the last 7 days?**

17. Click **Select Folder**, choose **Adoption Reports** from the Global Sales Reports folder, and click **Select Folder**.

18. Click **Save**.

Assessment Complete!

+100 points



Create Reports and Dashboards for Sales and Marketing Managers

100%

Progress: 100%

Retake this Step

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