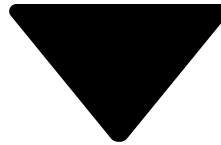


1. [Create Reports and Dashboards for Sales and Marketing Managers](#)




2. [Use Summary Formulas in Your Reports](#)

Use Summary Formulas in Your Reports


Summarize Your Data in a Whole New Way

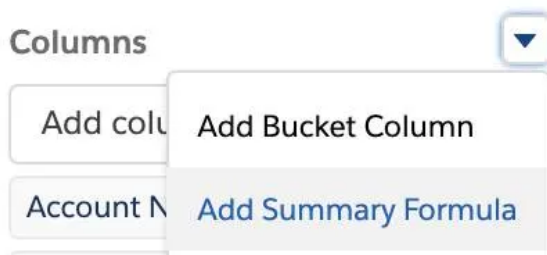
Summary formulas are a great way to calculate additional totals based on the numerical values in your report. In addition to the standard summaries that we used in a previous step, you can add up to five summary formulas to summary and matrix reports to create calculated summaries of your numerical fields. Your VP of Sales knows what each of her reps have in their pipelines; however, she would also like to see how they're closing deals. Let's build a report to show how her percentage of closed opportunities are actually being won.

Modify the Opportunities by Rep report to display closed opportunities by sales rep:

1. Click the **Reports** tab.
2. Click the **arrow**  next to the Opportunities by Rep report, and select **Edit**.
3. Click the **Filters** pane, click **Opportunity Status**.
4. Select **Closed** then click **Apply**.

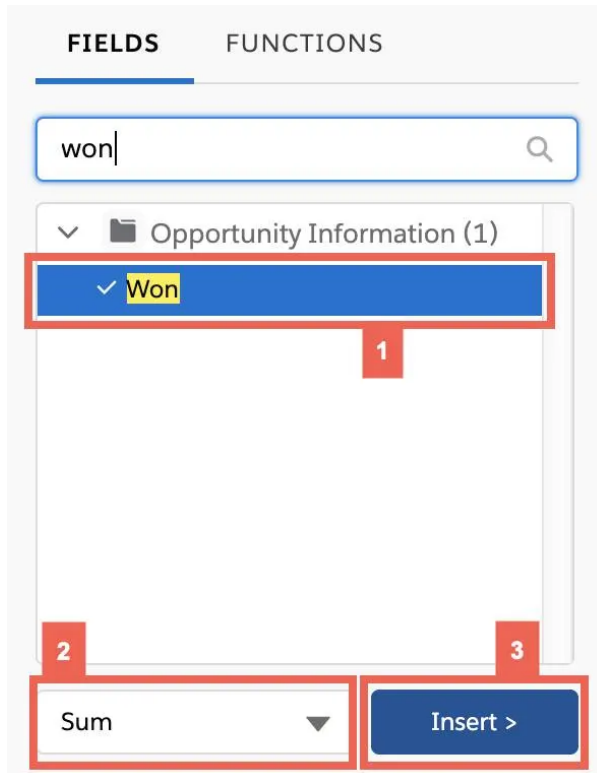
Add a custom summary formula to display the win rate by sales rep:

1. Click the **Outline** pane
2. Click the **arrow**  next to Columns and click **Add Summary Formula**.



3. Complete the following details:
 - Column Name: **Win Rate**
 - Description: **Ratio of won to closed opportunities**
 - Formula Output Type: **Percent**
 - Decimal Points: **2**


4. Place the cursor in the Formula section and complete the details:
 - In Search fields type and select **Won** [1], ensure **Sum** [2] is selected and click **Insert** [3].



- Place the cursor in the formula after SUM and enter `/`.
 - In the Search Fields menu, type and select **Closed**, then select **Sum** and **Insert**.
5. Ensure your formula looks like this: `WON:SUM/CLOSED:SUM`.
 6. Click **Validate** to ensure your formula has no errors.
 7. Click **Apply**.
 8. At the bottom of the Preview pane, slide the **toggle** next to Detail Rows to hide the details.

Save the report as a new report called Sales Rep Win Rates in the Global Sales Report folder:

1. Click the **arrow** next to Save and click **Save As**.
2. Complete the Save Report details:
 - Report Name: `Sales Rep Win Rates`
 - 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: `How well are my sales reps closing?`
3. Ensure this report is being saved to the **Global Sales Reports** folder.
4. Click **Save**.
5. Click **Run**.



REPORT: OPPORTUNITIES

Sales Rep Win Rates

How well are my sales reps closing?

Total Records	Total Amount	Win Rate
18	\$3,645,000.00	100.00%

<input type="checkbox"/> Opportunity Owner ↑ ▼	Sum of Amount	Record Count	<i>fx</i> Win Rate ▼
<input type="checkbox"/> Cameron Johnson	\$3,645,000.00	18	100.00%
Total	\$3,645,000.00	18	100.00%

Assessment Complete!

+100 points



Create Reports and Dashboards for Sales and Marketing Managers

100%

Progress: 100%

Retake this Step

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