1. Create Reports and Dashboards for Sales and Marketing Managers
2. Group and Categorize Your Data

Group and Categorize Your Data

One of the things that makes the Report Builder super easy to use is the ability to easily drag groupings to move them between rows and columns in reports. We use a matrix style report to display summaries from two or more levels of groupings in a grid. This allows you to display more data in a smaller space and makes quick comparisons across groups.

Group Data in Reports

Let's get back to your VP of Sales who would like the Opportunities by Rep report to show opportunities additionally grouped by Close Date and displayed in a table. No problem!

We'll modify the Opportunities by Rep report to group by the calendar month of the Close Date:

1. Click the **Reports** tab.
2. Click **All Folders**.
3. Click **Global Sales Reports**.
4. Click the **arrow** next to Opportunities by Rep, and select **Edit**.
5. In the Preview pane, click the **arrow** next to Close Date and select **Group Columns by This Field**.
6. Click the **arrow** in the Close Date summary row, hover over **Group Date By**, and then select **Calendar Month**.

Opportunity Owner ↑	Close Date →
Cameron Johnson	Sum of Amount Record Count
Total	Sum of Amount Record Count

7. At the bottom of the Preview pane slide the toggle next to **Detail Rows** and **Stacked Summaries** to deselect them.
8. Click the **arrow** next to Save, and click **Save As**, then complete the Save Report details:

   - Report Name: `Opportunities by Rep and Close Month`
   - 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 your sales reps have in the pipeline and when do they close?`

9. Ensure that this report is being saved in the **Global Sales Reports**.
10. Click **Save**.
11. Click **Run**.

Use Bucket Fields

Opportunities by Rep and Close Month report.

Matrix reports are a useful way to view data, but what if you need to organize your groupings by categories? That's where bucketing comes in. Bucketing lets you segment your report data on the fly by defining a set of categories, or "buckets," to sort, group, or filter the records.

Let's check out how bucketing works and fulfill one of your VP of Sales' reporting needs. We'll create a matrix report again, but this time show opportunities by owner, stage, and size in the pipeline this Fiscal Quarter.

Create a new Opportunity report:

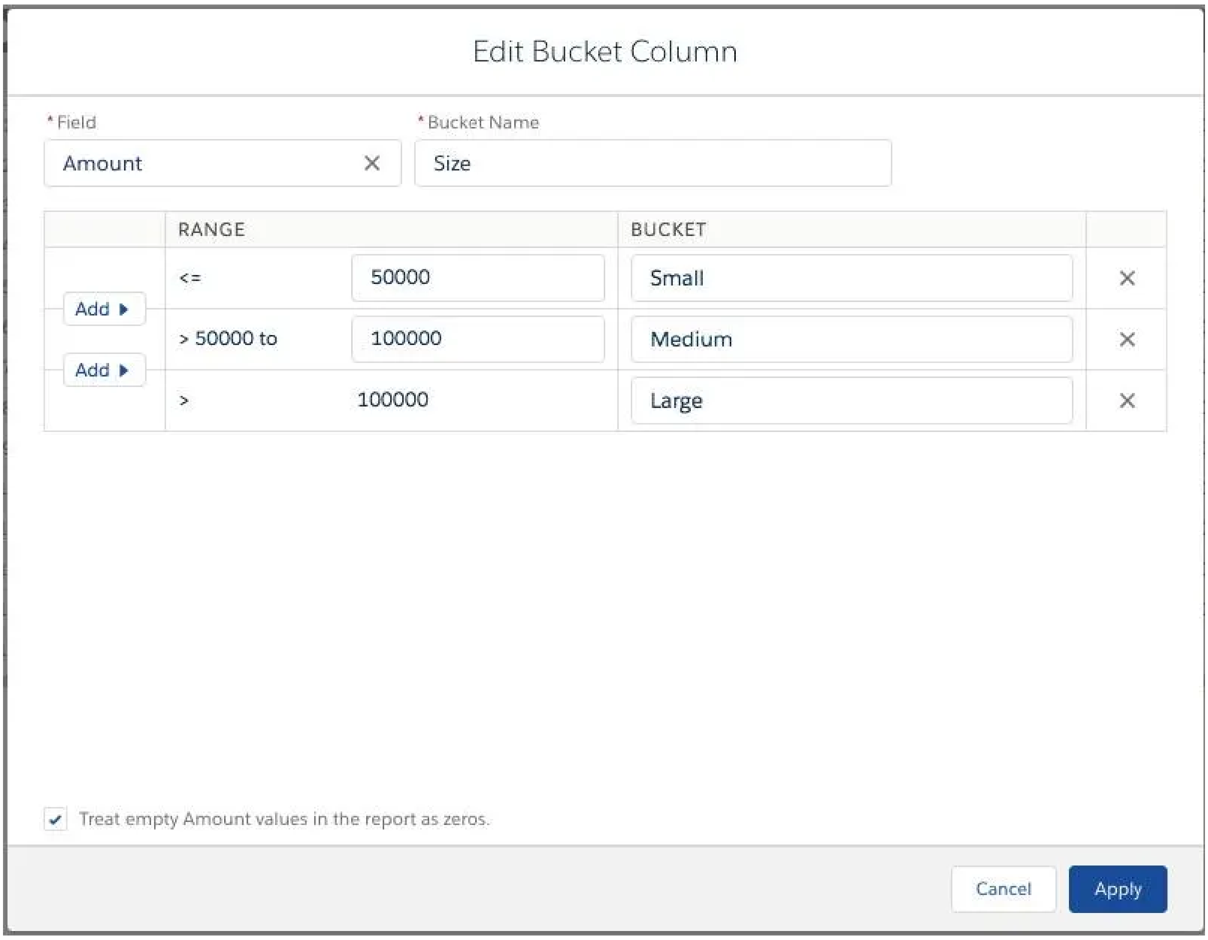
1. Click the **Reports** tab.
2. Click **New Report**.
3. In the Choose Report Type list, click **Opportunities**, and then select **Opportunities** from the list that appears.
4. Click **Continue**.
5. Click the **Filters** pane.
6. Ensure Close Date is set to **Current FQ**.
7. Click **Opportunity Status**, select **Open** then click **Apply**.
8. Click the **Outline** pane and click the **X** next to the following column headers to remove them:
   - Owner Role
   - Fiscal Period
   - Age
   - Created Date
   - Lead Source
   - Type

Add a bucket field to categorize the opportunities as small, medium, or large.

1. In the Outline pane, click the **arrow** next to Columns and click **Add Bucket Column**.
2. Remove current selection within the Field box, then search for and select **Amount**.
3. For Bucket Name, enter `Size`.
4. Complete the first range as follows:
   - Range: <= `50000`
   - Name: `Small`

5. Click **Add**, then complete the second range:
   - Range: > 50,000 to `100000`
   - Name: `Medium`

6. For the third range (> 100,000), in the Name field enter `Large`.
7. Ensure **Treat empty Amount values in the report as zeros** is selected.



8. Click **Apply**.

Group the report by Stage and Opportunity Owner, and by Size.

1. In the Preview pane, click the **arrow** next to Opportunity Owner and select **Group Rows by This Field**.
2. In the Preview pane, click the **arrow** next to Stage and select **Group Rows by This Field**.
3. Click the **arrow** next to Size and select **Group Columns by This Field**.
4. At the bottom of the Preview pane, slide the **toggle** next to Detail Rows, Subtotals, and Grand Total to deselect them.
5. Click **Save & Run** and complete the report details:
   - Report Name: `Pipeline Matrix Report Current FQ`
   - 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 big are the deals at each stage in the pipeline this FQ?`
6. Click **Select Folder**, choose **Global Sales Reports**, and click **Select Folder**.
7. Click **Save**.

Assessment Complete!

+100 points

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