

Reporting in SFDC – Create reports in SFDC

Overview

In this section, you will find information about how to create a report in Salesforce.

Concerned profiles:

ALL

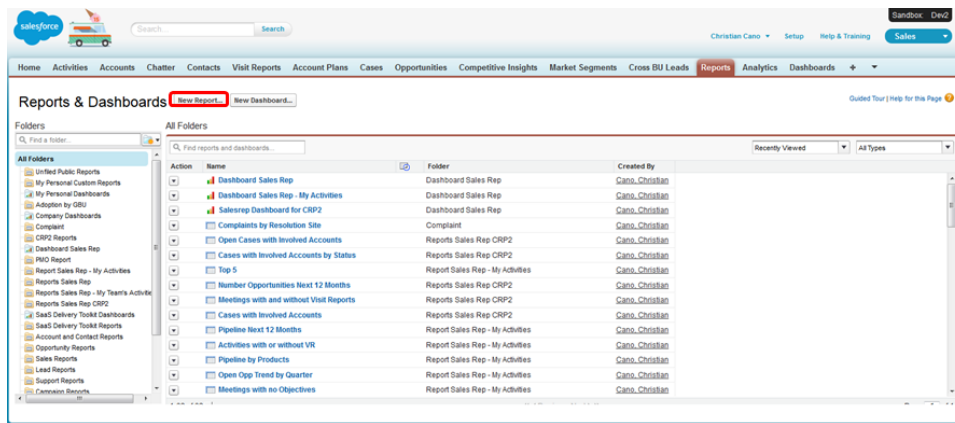
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Step By Step

Creating a Report

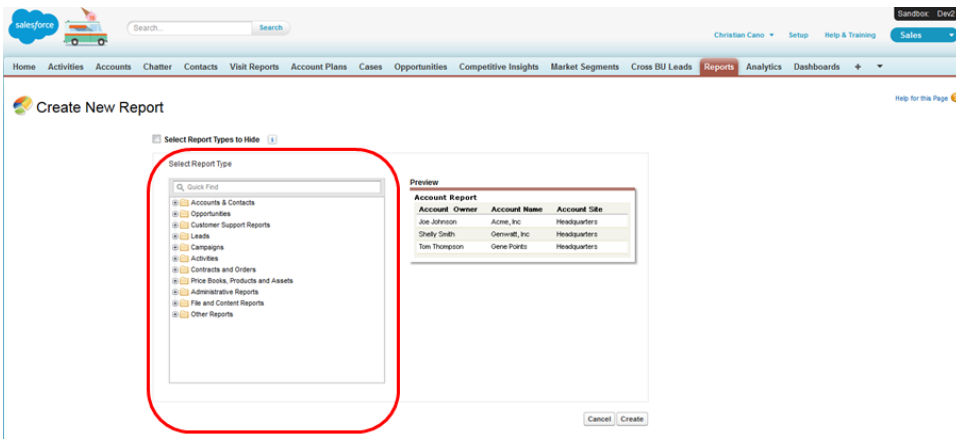
- David wants to prepare a report so he goes to the tab **Reports**.
- David clicks on **New Report**.



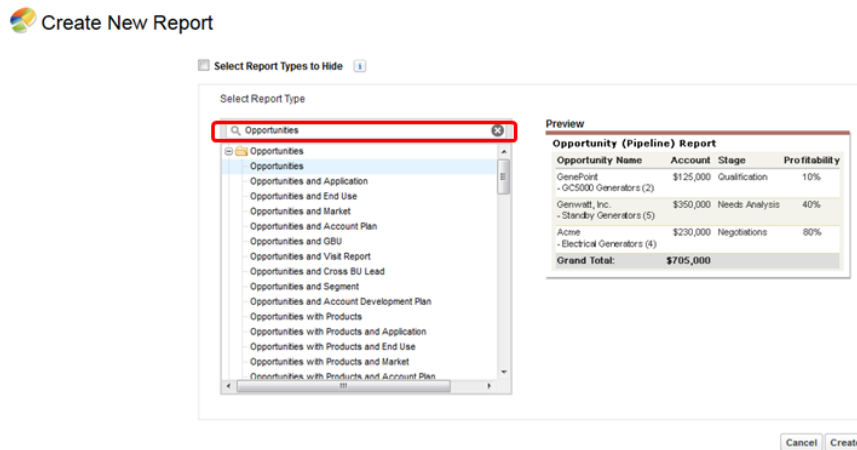
Selecting the Report Type

•David is transferred to the **Create New Report** page.

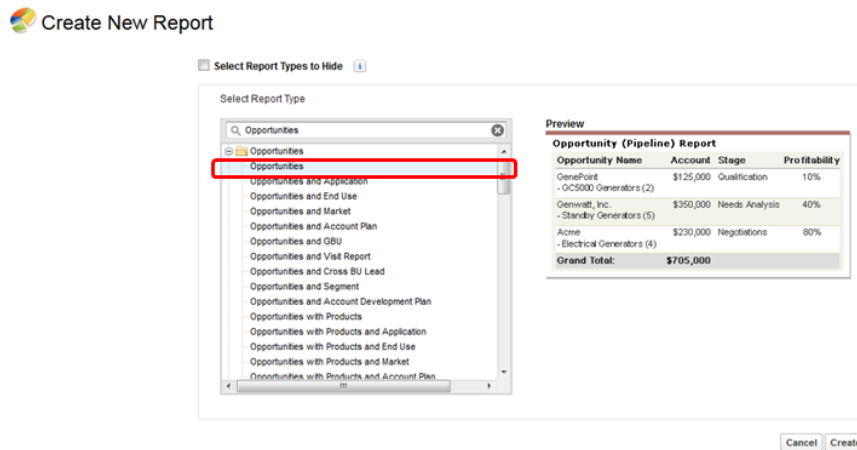
•Now he can choose from a number of **Report Types**



•As David wants to create an Opportunity report, he types "Opportunities" in the search box. •He is presented with the search results: all reports with Opportunities in the title.



•Then, he selects Opportunities from the search results list. •David clicks on the Create button.



Familiarizing with the Report page

•David has opened the page where he can start creating his new Report.

•The page consists of 3 parts: a panel to add fields, filters and the preview of the result

Zone to add filters and selection to precise the report

Opportunity Name	Type	Lead Source	Amount	Close Date	Next Step	Stage	Probability (%)	Fiscal Period	Age	Created Date	Opportunity Owner
mg	-	-	EUR 12.00	10/7/2015	-	1 - Qualify	20%	Q3-2015	56	19/06/2015	Frangipane Cleary
P&G Mouth Wash 2015	-	-	EUR 5.000.000	10/7/2015	-	5 - Closed Won	100%	Q3-2015	2	29/06/2015	Elen Ye
Testing Inno	-	-	EUR 1.200.000	10/7/2015	-	4 - Negotiate	50%	Q3-2015	62	05/06/2015	Christian Cano
Sell TECHNIVL	-	-	EUR 2.270	7/07/2015	-	2 - Lab Testing	30%	Q3-2015	90	05/06/2015	Stefano Meazza
Sell Wood	-	-	EUR 3.937	14/07/2015	-	2 - Lab Testing	30%	Q3-2015	83	16/06/2015	Stefano Meazza
Open Consignment stock	-	-	EUR 3.000	14/07/2015	-	2 - Negotiate	60%	Q3-2015	90	05/06/2015	Stefano Meazza
Qualif Rhodoline	-	-	EUR 1.000	15/07/2015	-	4 - Negotiate	50%	Q3-2015	64	4/05/2015	Pierre-edouard Couturier
Air space ceramics	-	-	EUR 4.000.000	16/07/2015	-	1 - Qualify	40%	Q3-2015	62	05/06/2015	Christian Cano
test opp	-	-	EUR 1.000.000	17/07/2015	-	3 - Industrial testing	40%	Q3-2015	62	05/06/2015	Christian Cano
Test11	-	-	EUR 100.000	17/07/2015	-	2 - Negotiate	60%	Q3-2015	62	05/06/2015	Christian Cano
Qualification Rhodoline	-	-	EUR 3.000.000	22/07/2015	-	4 - Negotiate	50%	Q3-2015	77	21/05/2015	Marina Macchia
new P&G-10 for Siemens China	-	-	EUR 5.000.000	22/07/2015	-	1 - Qualify	40%	Q3-2015	71	27/05/2015	Christian Cano
Qualification Rhodoline	-	-	EUR 8.000.000	23/07/2015	-	4 - Negotiate	50%	Q3-2015	62	05/06/2015	JDA
JDA	-	-	EUR 2.000	28/07/2015	-	2 - Negotiate	60%	Q3-2015	83	16/06/2015	Stefano Meazza
Huatai Motor CAC	-	-	-	30/07/2015	-	3 - Industrial testing	60%	Q3-2015	64	30/06/2015	Tony Song
TEST OPPY CONFIDENTIAL for GLKVIEW	-	-	EUR 3.000.000	30/07/2015	-	3 - Industrial testing	40%	Q3-2015	65	06/06/2015	Anne Gilles

Panel to find fields to be included in the report

Preview of the results

Adding fields to his Report

•First, David will clean all of the fields that he does not need. As he wants to make a Report on Closed Opportunities by Opportunity Owner he will only keep the Opportunity Name, Opportunity Owner, Account Name, Closed Date, Probability and the Stage.

•He drags and drops the fields from and to the Fields Panel to add or remove them.

Opportunity Name	Opportunity Owner	Account Name	Close Date	Probability (%)	Stage
mg	FRANGIPANE CLEARY	ING	10/7/2015	20%	1 - Qualify
P&G Mouth Wash 2015	Elen Ye	Procter & Gamble Shanghai plant	10/7/2015	100%	5 - Closed Won
Testing Inno	Christian Cano	Pinto S.A.	3/07/2015	50%	4 - Negotiate
Sell TECHNIVL	Stefano Meazza	TEST - Meazza Spa	7/07/2015	30%	2 - Lab Testing
Open Consignment stock	Stefano Meazza	TEST - CH99 Spa	14/07/2015	30%	2 - Lab Testing
Qualif Rhodoline	Pierre-edouard Couturier	Recalt benckiser	15/07/2015	50%	4 - Negotiate
Air space ceramics	Christian Cano	BALTKERAMKA	16/07/2015	40%	1 - Qualify
test opp	Christian Cano	VALEO SISTEMAS AUTOMOTIVOS LTD.	17/07/2015	40%	3 - Industrial testing
Test11	Christian Cano	Pinto S.A.	17/07/2015	60%	2 - Negotiate
Qualification Rhodoline	Marina Macchia	BIAYER CROPSCIENCE SRL	22/07/2015	50%	4 - Negotiate
new P&G-10 for Siemens China	Giuseppe Houtappel	Siemens China	22/07/2015	40%	1 - Qualify
Qualification Rhodoline	Christian Cano	BIAYER CROPSCIENCE SRL	23/07/2015	50%	4 - Negotiate
JDA	Stefano Meazza	TEST - CH99 Spa	28/07/2015	60%	2 - Negotiate
Huatai Motor CAC	Tony Song	LaGing YuCheng Electrical Co. Ltd	30/07/2015	60%	3 - Industrial testing
TEST OPPY CONFIDENTIAL for GLKVIEW	Anne Gilles	BIAYER CROPSCIENCE	30/07/2015	40%	3 - Industrial testing



In a report, you can select all the fields available for the record and report on it.

•Another way of adding fields is by double-clicking on the fields.
 •David searches for and double-clicks on the Expected Yearly Revenues field to add it automatically.

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mg	Franchise Country	mg	281,472.00	1/07/2015	20 %	1 - Quality
P&G Mouth Wash 2015	Elián Ye	Procter & Gamble Shanghai plant	5,000,000.00	1/07/2015	100 %	5 - Closed Won
Testing Inno	Christian Cano	Pinto S.A	144,000.00	3/07/2015	50 %	4 - Negotiate
Sell TECHNOL	Stefano Meazza	TEST - Meazza Spa	621.00	7/07/2015	30 %	2 - Lab Testing
Sell Wood	Stefano Meazza	TEST - Meazza Spa	0.00	14/07/2015	30 %	2 - Lab Testing
Open Consignment stock	Stefano Meazza	TEST - CH69 Spa	300.00	14/07/2015	60 %	2 - Negotiate
Qualif Rhodolite	Flame-Edouard Couturier	RicelB bioscience	400.00	15/07/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALKERAMKA	1,350,000.00	16/07/2015	40 %	1 - Quality
test opp	Christian Cano	VALEO SISTEMAS AUTOMOTIVOS LTD.	2,000,000.00	17/07/2015	40 %	3 - Industrial testing
Test11	Christian Cano	Pinto S.A	190,000.00	17/07/2015	60 %	2 - Negotiate
Qualification Rhodolite	Marika Macchia	BAYER CROPSCIENCE SRL	3,500,000.00	22/07/2015	50 %	4 - Negotiate
new P&S-10 for Siemens China	Georges Houdappel	Siemens China	50,000.00	22/07/2015	40 %	1 - Quality
Qualification Rhodolite	Christian Cano	BAYER CROPSCIENCE SRL	4,018,000.00	23/07/2015	50 %	4 - Negotiate
JDA	Stefano Meazza	TEST - CH69 Spa	0.00	28/07/2015	60 %	2 - Negotiate
Hustai Motor CAC	Tony Song	LuDong YuCheng Electrical Co. Ltd	0.00	30/07/2015	60 %	3 - Industrial testing
TEST OPPY CONFIDENTIAL for OLK/VEV	Anne Gilles	BAYER CROPSCIENCE	325,000.00	30/07/2015	40 %	3 - Industrial testing

Familiarizing with the filters

•Now that the report includes all the fields David wanted, he will refine the output by applying filters. He would like to get only the weeklies from the Happy Chocolate account.

•He goes to the filter zone and there he has some options to choose from.

Filters: Add. Enables you to add filters to your Report

Range. Allows you to quickly select a timeframe, e.g. this week, last month, previous year are some of the option

Show: All opportunities. Enables you to choose all the Opportunities you have access to, only the ones from your team or only your Opportunities.

Date field. Allows you to quickly make some selection on the dates

Defining Report filters

•David clicks on the **Add** button in the **Filters** section in order to add a filter.
•A new line appears.

•David creates a filter to narrow the Opportunities Report down to the **Closed** ones.
•In the filter he selects **Stage = equals** and clicks on the lookup field.

•He selects all the stage that are **Closed** and clicks on **Insert Selected**.

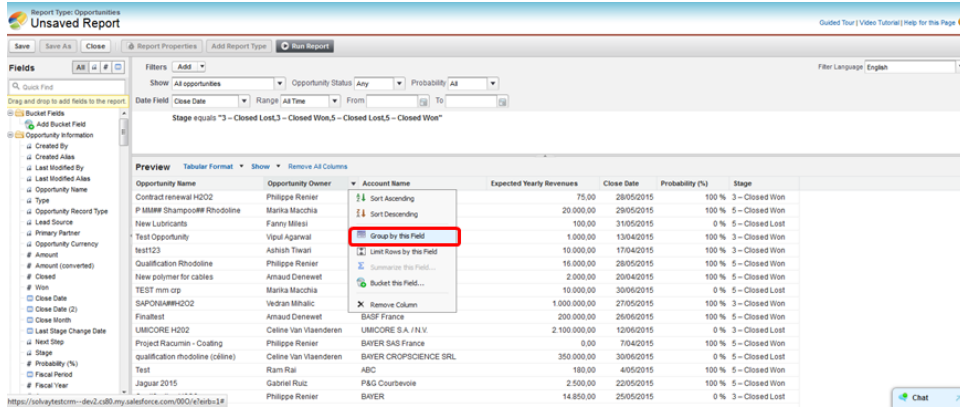
•David now needs to click on **OK**.

Previewing the Report

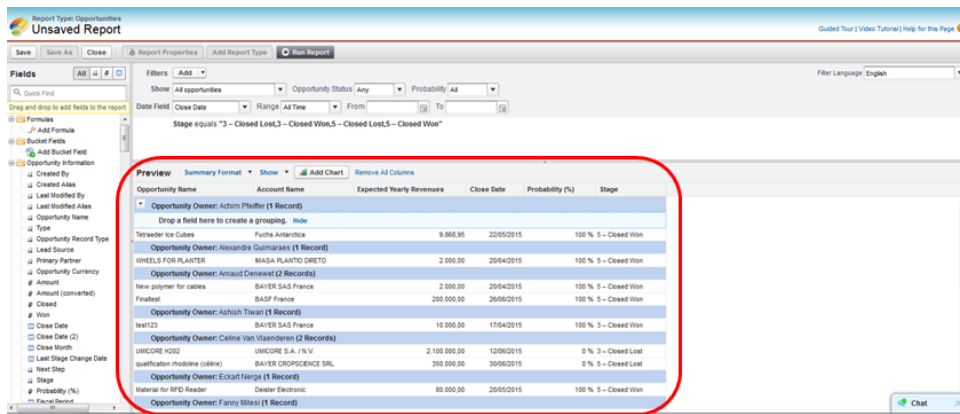
•Now, he is able to see the results in the preview section.

Grouping the Report by field

•David wants to group the Report by Opportunity Owner.
•In order to do this, he clicks on the arrow next to the Opportunity Owner field and clicks on **Group By This Field**.

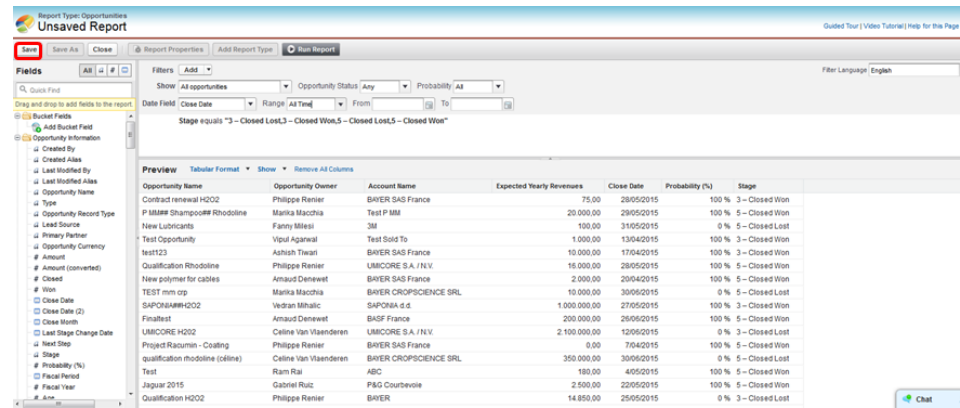


•David can see the result in the Preview section.

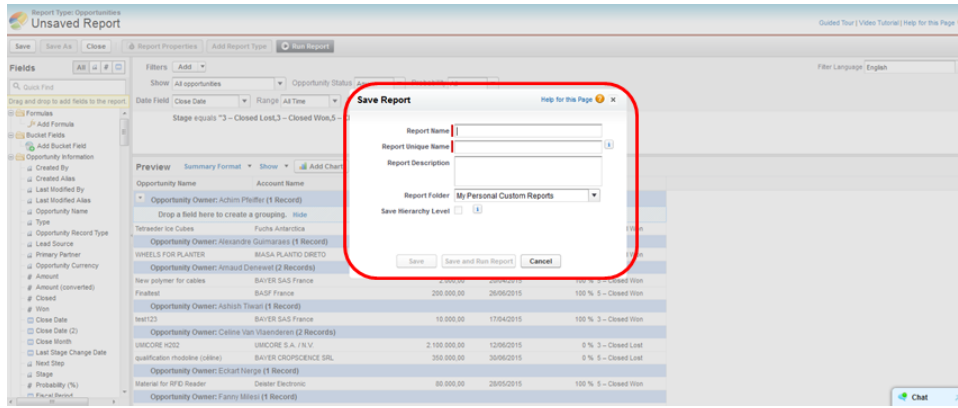


Saving the Report

•David sees that the report is correctly created.
•Now, he would like to save it in order to be able to re-run it later.
•He clicks on the **Save** button.



- The Save Report window opens and David will enter a Report Name and select a folder to save the report in.
- It's always recommended to save the report in the folder "My Personal Custom Reports" before saving it into another shared folder



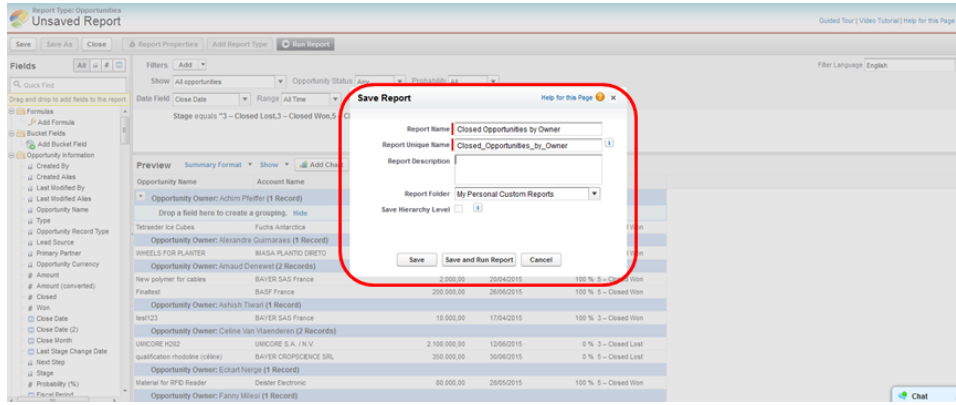


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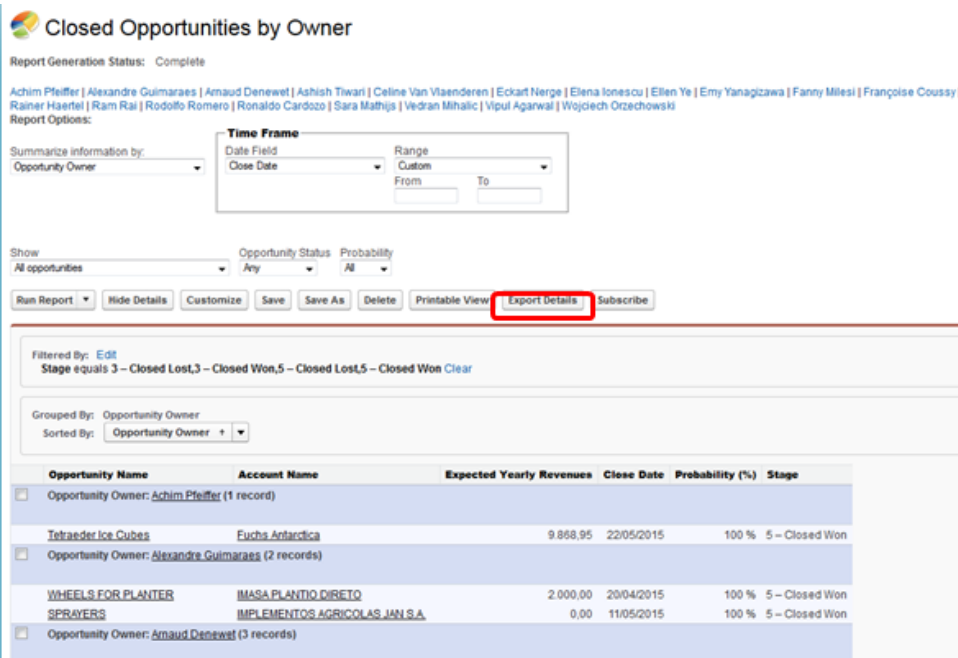
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•David enters "Closed Opportunities by Owner" as the Report Name.
 •He chooses where the report should be saved. He selects the Report Folder "My Personal Custom Reports".
 •Then he clicks Save.

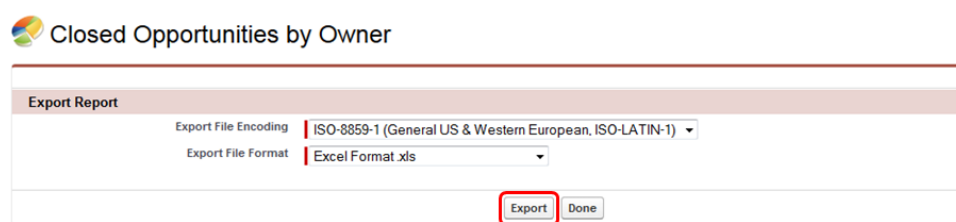


Exporting the Report to an excel file

•Now, David would like to export the report into an excel file
 •He clicks on Run Report to run the report on the whole database (please note the preview is not always complete, it is limited to a number of lines).
 •Then David clicks on the button Export Details.



•He is transferred to a new window called Export Report.
 •He clicks on the Export button.



Viewing the Report in the excel file

•He now has an excel file with all the data available from Salesforce.

Opportunity Name	Account Name	Expected Yearly Revenue	Close Date	Probability	Stage	Opportunity Owner
Tetraeder Ice Cubes	Fuchs Antartica	9868,95	22/05/2015	100 %	5 - Closed Won	Achim Pfeiffer
WHEELS FOR PLANTER	IMASA PLANTIO DIRETO	2.000,00	20/04/2015	100 %	5 - Closed Won	Alexandre Guimaraes
SPRAYERS	IMPLEMENTOS AGRICOLAS JAN S.A.	0,00	11/05/2015	100 %	5 - Closed Won	Alexandre Guimaraes
New polymer for cables	BAYER SAS France	2000,00	20/04/2015	100 %	5 - Closed Won	Arnaud Deneuwet
Finaltest	BASF France	200000,00	26/06/2015	100 %	5 - Closed Won	Arnaud Deneuwet
Test ADE - Opp	BAYER SAS France	2000,00	25/05/2015	100 %	7 - Closed Won	Arnaud Deneuwet
test123	BAYER SAS France	10000,00	17/04/2015	100 %	7 - Closed Won	Ashish Tiwari
UMICORE H202	UMICORE S.A. / N.V.	220000,00	12/06/2015	0 %	7 - Closed Lost	Celine Van Vlaenderen
qualification rhodoline (online)	BAYER CROSCIENCE SRL	350000,00	30/06/2015	0 %	7 - Closed Lost	Celine Van Vlaenderen
test H20202	testov	250000,00	15/06/2015	100 %	7 - Closed Won	Celine Van Vlaenderen
Iron Ice	MALAYSIAN NEWSPRINT INDUSTRIES	448900,00	7/05/2015	100 %	7 - Closed Won	Celine Van Vlaenderen
Material for RFID Reader	Dexter Electronic	80000,00	28/05/2015	100 %	7 - Closed Won	Eckart Nerge
Jaguar C 500	P&G Paris	2600000,00	22/05/2015	100 %	7 - Closed Won	Elena Ionescu
P&G Mouth Wash 2016	Procter & Gamble Shanghai plant	5000000,00	1/07/2015	100 %	7 - Closed Won	Ellen Ye
New softener	BASF Shanghai Plant	3000000,00	29/06/2015	100 %	7 - Closed Won	Ellen Ye
P&G new generation mouth wash	Procter & Gamble Shanghai plant	5000,00	24/06/2015	100 %	7 - Closed Won	Ellen Ye
New product development with ABC	ABC	26000,00	31/05/2016	0 %	7 - Closed Lost	Ellen Ye
Mahle 2013 contract	Mahle Behr CRP test 1	5940,00	11/05/2015	100 %	7 - Closed Won	Emy Yanagizawa
New Lubricants	3M	200,00	31/05/2015	0 %	7 - Closed Lost	Fanny Milessi
Stripcut price update	3M	50000,00	8/05/2015	100 %	7 - Closed Won	Fanny Milessi
Flame retardant for cloth	Georgia Cie	500,00	19/05/2015	100 %	7 - Closed Won	Fanny Milessi
INNOVATION	Siemens	14931,00	31/05/2016	0 %	7 - Closed Lost	Françoise Cousy
Jaguar 2015	P&G Courbevoie	2000,00	22/05/2015	100 %	7 - Closed Won	Gabriel Ruiz
qualification rhodoline	BAYER CROSCIENCE	500000,00	8/05/2015	100 %	7 - Closed Won	Jingjing Hu
MMW Shampoo Rhodoline	Test P MM	20000,00	29/05/2015	100 %	7 - Closed Won	Marka Macchia
TEST mm crp	BAYER CROSCIENCE SRL	10000,00	30/06/2015	0 %	7 - Closed Lost	Marka Macchia
Application for Rhodoline	P&G Auberwillers	2000,00	22/05/2015	0 %	7 - Closed Lost	Marka Macchia
app mm a	Test MM A	30000,00	11/05/2015	100 %	7 - Closed Won	Marka Macchia
MMSD Application xyz	Test MM SD	10000,00	12/05/2015	100 %	7 - Closed Won	Marka Macchia

Exporting the Report to an excel file

•David can also get a printable view of his report. For this, he clicks on Run Report to run the report on the whole database. •Then David clicks on the button Printable View.

Report Generation Status: Complete

Achim Pfeiffer | Alexandre Guimaraes | Arnaud Deneuwet | Ashish Tiwari | Celine Van Vlaenderen | Eckart Nerge | Elena Ionescu | Ellen Ye | Emy Yanagizawa | Fanny Milessi | Françoise Cousy | Rainer Haerfel | Ram Rai | Rodolfo Romero | Ronaldo Cardozo | Sara Matys | Vedran Mihalic | Vipul Agarwal | Wojciech Orzechowski

Report Options:

Summarize information by: Opportunity Owner

Time Frame: Date Field: Close Date, Range: Custom, From: , To:

Show: Opportunity Status: Any, Probability: All

Run Report | Hide Details | Customize | Save | Save As | Delete | **Printable View** | Export Details | Subscribe

Filtered By: Edit
Stage equals 3 - Closed Lost, 3 - Closed Won, 5 - Closed Lost, 5 - Closed Won Clear

Grouped By: Opportunity Owner
Sorted By: Opportunity Owner

Opportunity Name	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Opportunity Owner: Achim Pfeiffer (1 record)					
Tetraeder Ice Cubes	Fuchs Antartica	9.868,95	22/05/2015	100 %	5 - Closed Won
Opportunity Owner: Alexandre Guimaraes (2 records)					
WHEELS FOR PLANTER	IMASA PLANTIO DIRETO	2.000,00	20/04/2015	100 %	5 - Closed Won
SPRAYERS	IMPLEMENTOS AGRICOLAS JAN S.A.	0,00	11/05/2015	100 %	5 - Closed Won
Opportunity Owner: Arnaud Deneuwet (3 records)					

Viewing the Report in the excel file

•The result is a more presentable table to print or show, but less easy to work with in Excel.

Opportunity Name	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Opportunity Owner: Achim Pfeiffer (1 record)					
Tetraeder Ice Cubes	Fuchs Antartica	9.868,95	22/05/2015	100 %	5 - Closed Won
Opportunity Owner: Alexandre Guimaraes (2 records)					
WHEELS FOR PLANTER	IMASA PLANTIO DIRETO	2.000,00	20/04/2015	100 %	5 - Closed Won
SPRAYERS	IMPLEMENTOS AGRICOLAS JAN S.A.	0,00	11/05/2015	100 %	5 - Closed Won
Opportunity Owner: Arnaud Deneuwet (3 records)					
New polymer for cables	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
Finaltest	BASF France	200.000,00	26/06/2015	100 %	5 - Closed Won
Test ADE - Opp	BAYER SAS France	2.000,00	25/05/2015	100 %	5 - Closed Won
Opportunity Owner: Ashish Tiwari (1 record)					

Subscribing to a report

David wants to receive automatically the report by email. To achieve this, he clicks on Subscribe.

My Visit Report
Report Generation Status: Complete

Report Options:
Summarize information by: Account: Account Name
Show: My visit reports

Time Frame:
Date Field: Created Date
Range: Custom
From: [] To: []

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details | **Subscribe**

Grouped By: Account: Account Name | Subject
Sorted By: Account: Account Name | Subject

Date of the Visit	Contact: Full Name
Account: Account Name: <u>CENTRAL GLASS CO., LTD.</u> (1 record)	
Subject: <u>Business Review</u> (1 record)	
29/04/2016	<u>Kaori ABE</u>
Grand Totals (1 record)	

Check rows to filter, then drill down by: --None-- | Drill Down

Report Subscription | Save | Save & Run Now | Cancel

When you subscribe to a report, you can define the set of conditions to meet before sending a notification, and choose how and when to be notified. Make sure to save any changes to your report before subscribing.

Type: Notify me: Every time conditions are met
 Only the first time conditions are met

Conditions: Aggregate: --None-- Operator: --None-- Value: [] AND

Schedule: Frequency: Every Weekday
 Daily
 Weekly
Time: 10:00
Day: vendredi

Actions: Send Salesforce1 Notification
 Post to Chatter Feed
 Send Email Notification
 Execute a Custom Action: --None--

Preview:
Alert: The conditions in 'My Visit Report' have been met. <https://solway-crm--UAT.cs87.my.salesforce.com/00O8E00000Ji5X>
'Active Concurrent Users' is equal to 500
'Average Session Minutes' is 23 and is greater than 20.

Active:

Save | Save & Run Now | Cancel

Annotations:
- Red box around 'Type' and 'Conditions' fields: He could define a set of condition to meet before sending the report.
- Green box around 'Schedule' section: Then he sets the frequency of the sending.
- Blue arrow pointing to 'Send Email Notification': He chooses to send an email.
- Red arrow pointing to 'Active' checkbox: Finally he checks that the schedule is active and saves.

Wanting to schedule a report

David wants to receive automatically the report by email. To achieve this, he clicks on Subscribe.

PDQR - Data creation/month - Accounts

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Range:

From: To:

Run Report Now

Filtered By:

GBU not equal to

AND Profile: Name does not contain admin

AND Created By: Full Name does not contain admin

AND Created By: Full Name does not contain Brahmanayagam

AND Created By: Full Name does not contain Seabra

Scheduling the sending of the report

Schedule Report

Running User: The running user is used to define visibility security setting of the report content: if I select « User A » I will not see my data but only the data that could be seen by the User A.

Email Report: To me To me and/or others...

Search: for:

Select From

- User: Adam Czarnul
- User: Anne Debusscher
- User: Céline Vanvlaenderen
- User: Eckart Nerge
- User: Fanny Milesi
- User: Florent Thivin
- User: José ignacio Patiño

Add

Send Email To

- User: Julien Andreoli
- User: Clotilde Dellafaille

You can be the only receiver of the report or you can also send it to other salesforce users.

Schedule Report

Frequency: Daily Weekly Monthly

On day of every month

Start: [

End: [

Preferred Start Time:

You can set the frequency of the sending.

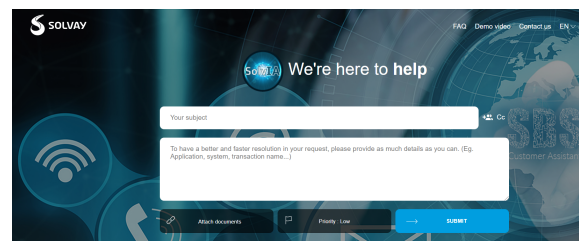
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- [Reporting in SFDC - Definition](#)
- [Reporting in SFDC - Viewing existing reports in SFDC \(depends on profile\)](#)
- [Opportunity with end use \(report\)](#)
- [Reporting on GBU Segmentation Fields in SFDC.](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example