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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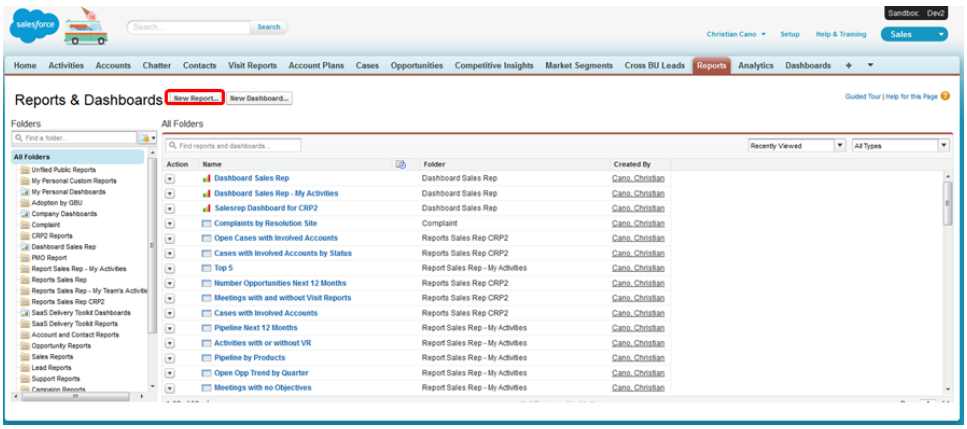
Step By Step

Creating a Report

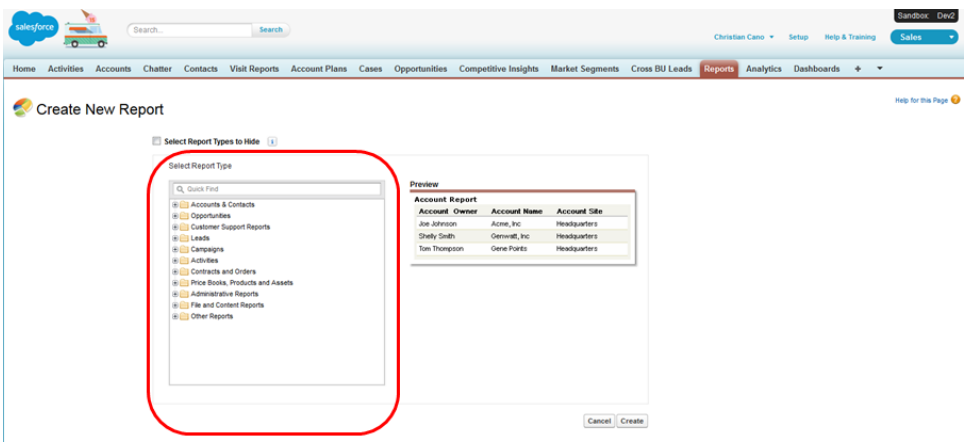
•David wants to prepare a report so he *goes* to the tab **Reports**.
•David *clicks* on **New Report.**



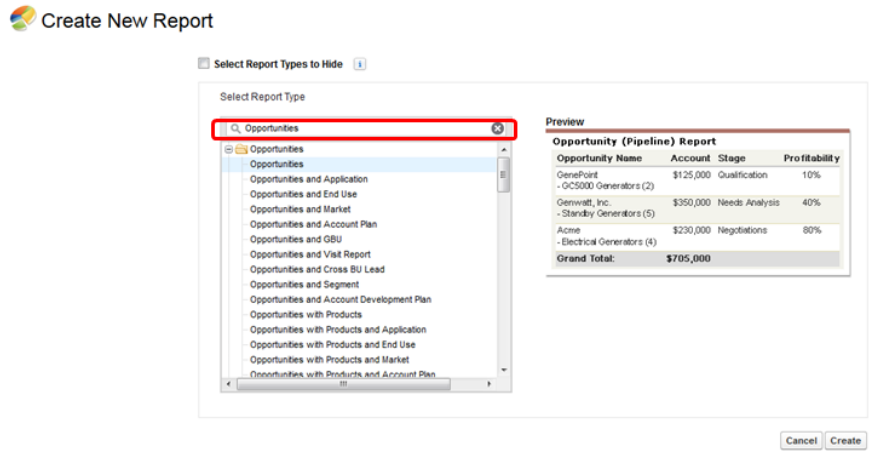
Selecting the Report Type

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

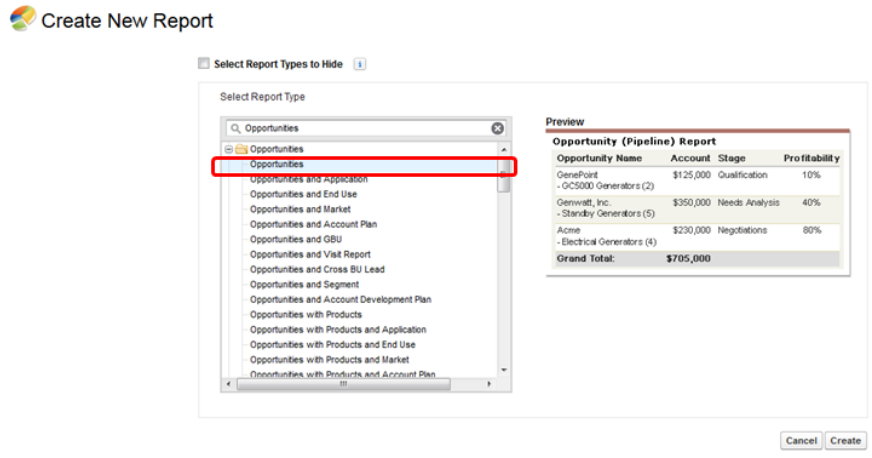
•Now he can *choose* from a number of **Report Types**



•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.



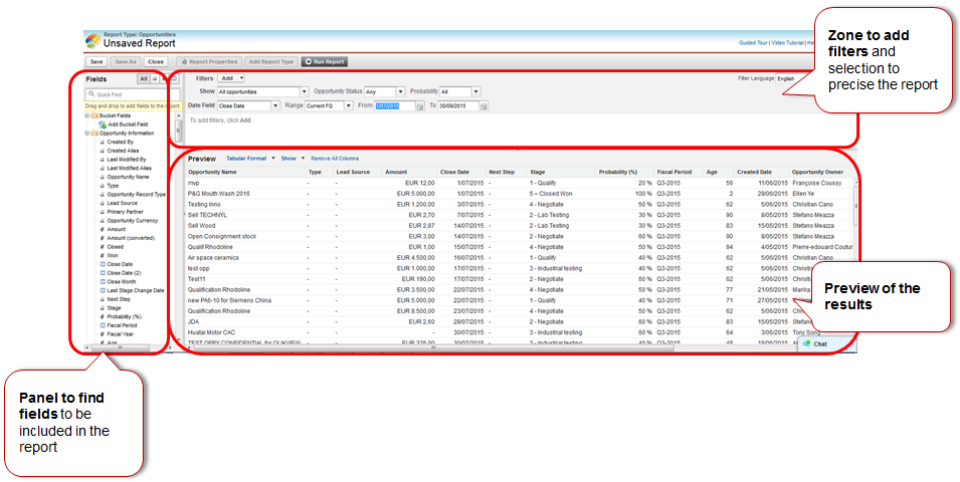
•Then, he selects Opportunities from the search results list.
•David clicks on the Create button.



Familiarizing with the Report page

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

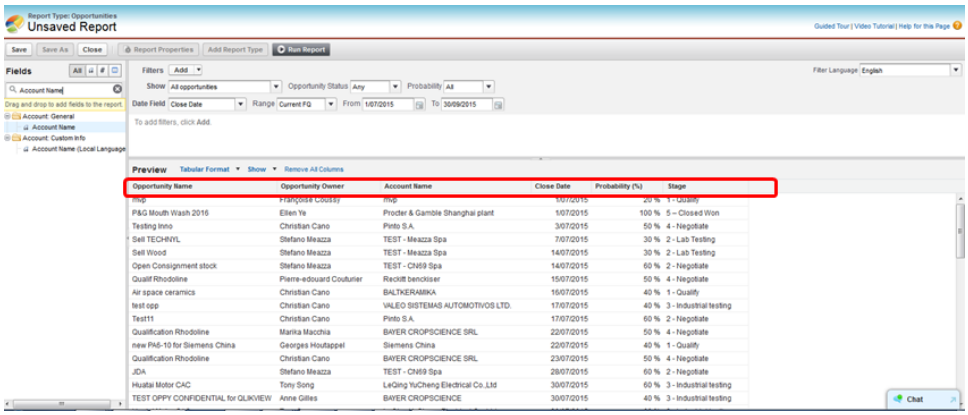
•The page consists of 3 parts: a panel to add fields, filters and the preview of the result



Adding fields to his Report

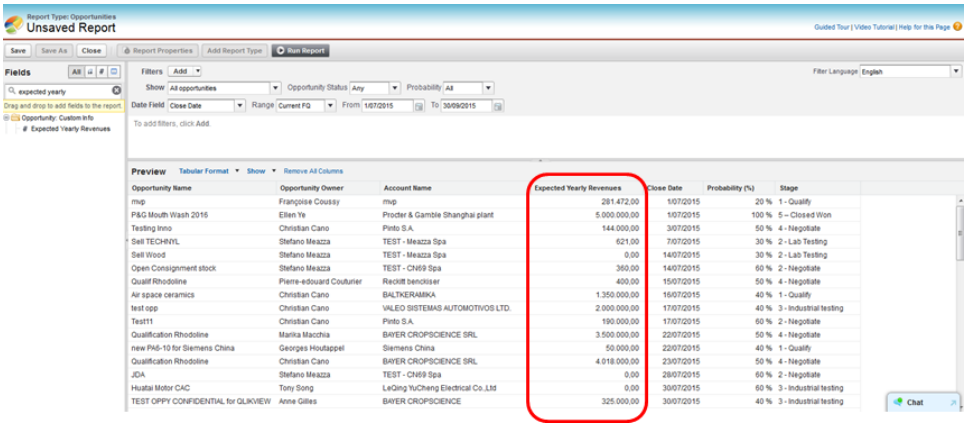
•First, David will clean all of the fields that he does not need. As he wants to make a Report on Closed Opportunities by Opportunity Owner he will only keep the Opportunity Name, Opportunity Owner, Account Name, Closed Date, Probability and the Stage.

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



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

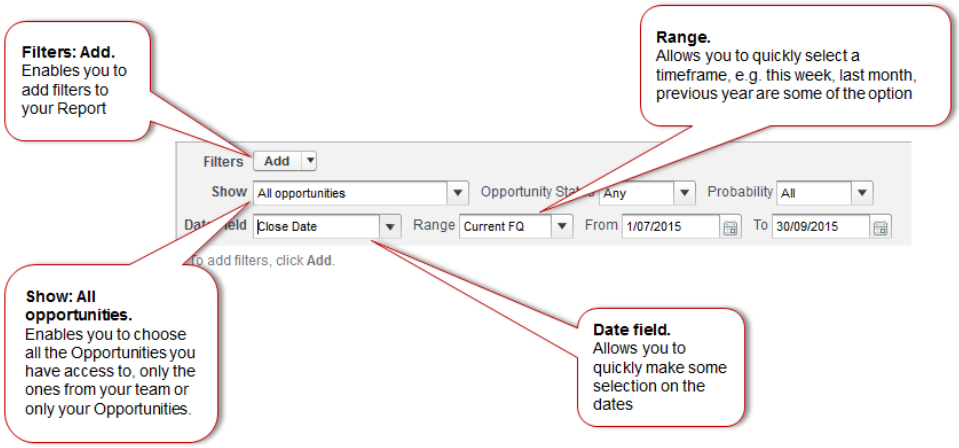
•Another way of adding fields is by double-clicking on the fields.
•David searches for and double-clicks on the Expected Yearly Revenues field to add it automatically.



Familiarizing with the filters

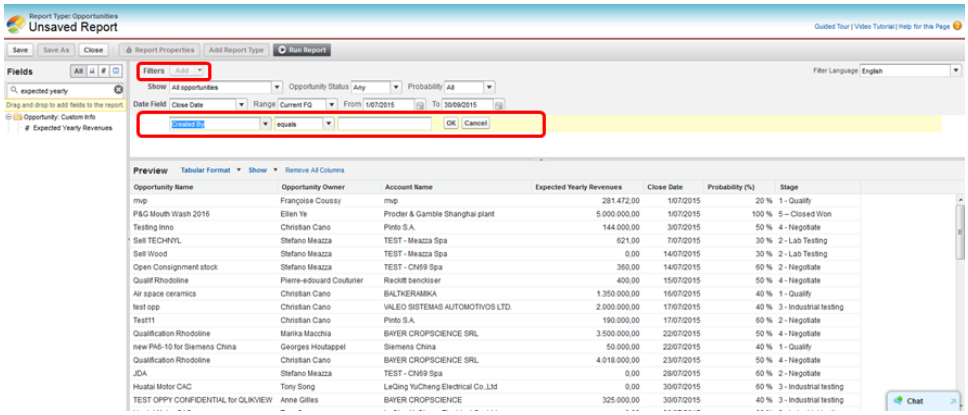
•Now that the report includes all the fields David wanted, he will refine the output by applying filters. He would like to get only the weeklies from the Happy Chocolate account.

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

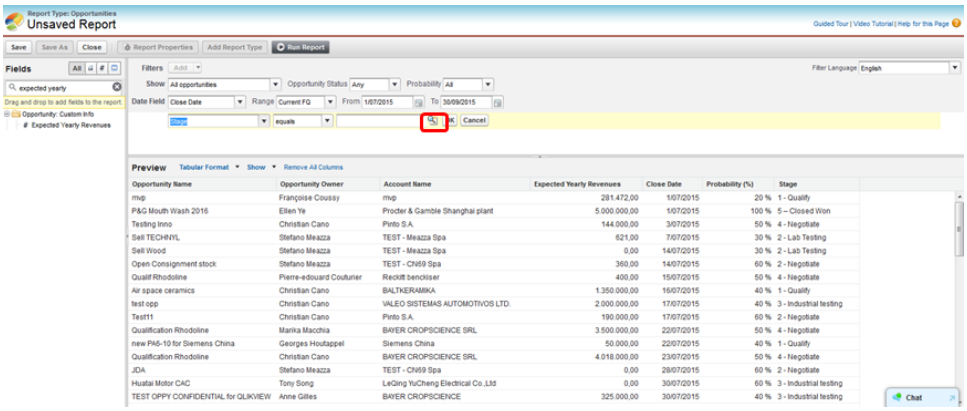


Defining Report filters

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

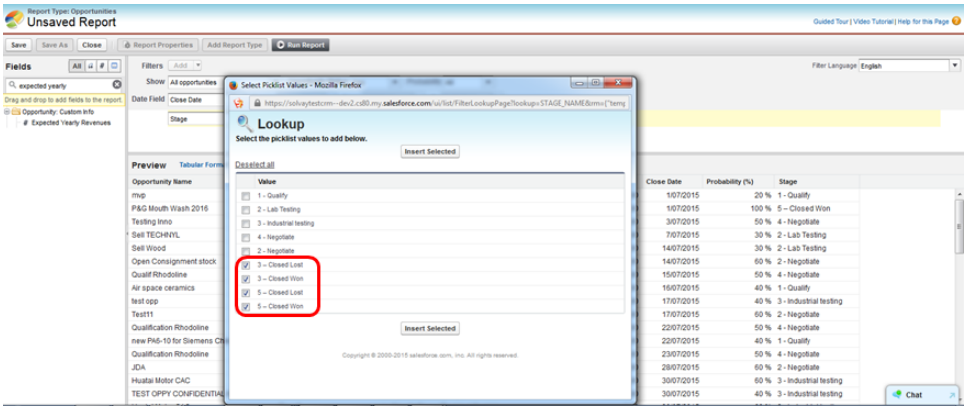


•David creates a filter to narrow the Opportunities Report down to the Closed ones.
•In the filter he selects Stage – equals – and clicks on the lookup field.



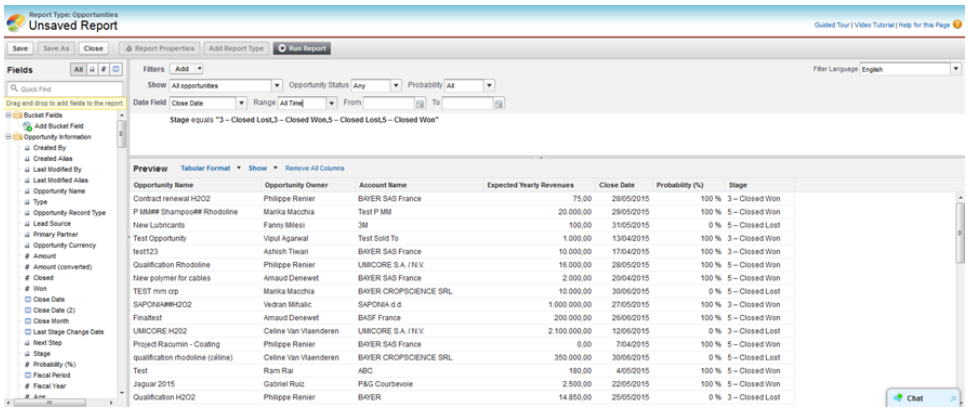
•He *selects* all the stage that are **Closed** and *clicks* on **Insert Selected.**

•David now needs to *click* on **OK**.



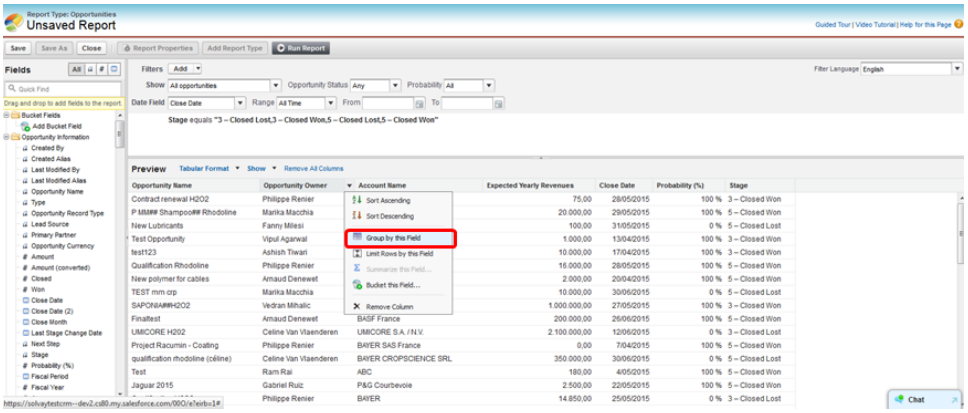
Previewing the Report

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

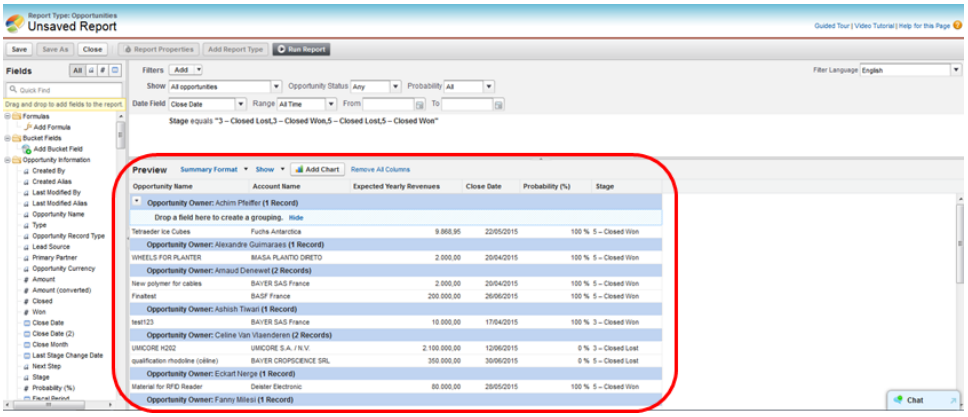


Grouping the Report by field

•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.**

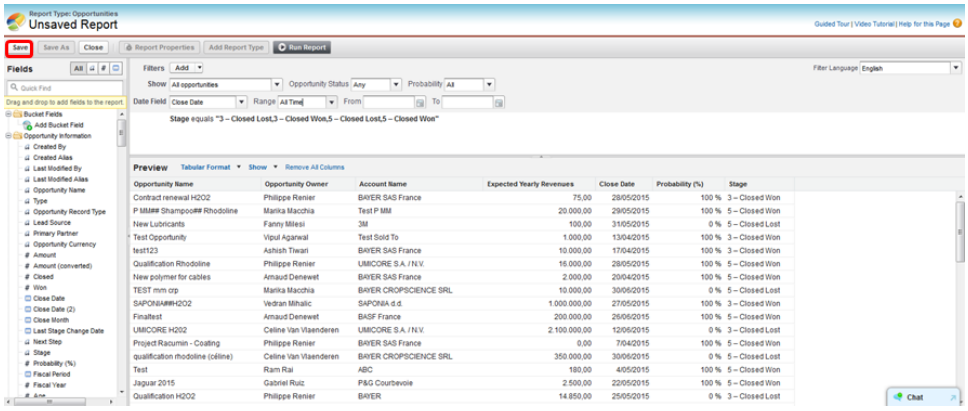


•David can see the result in the Preview section.

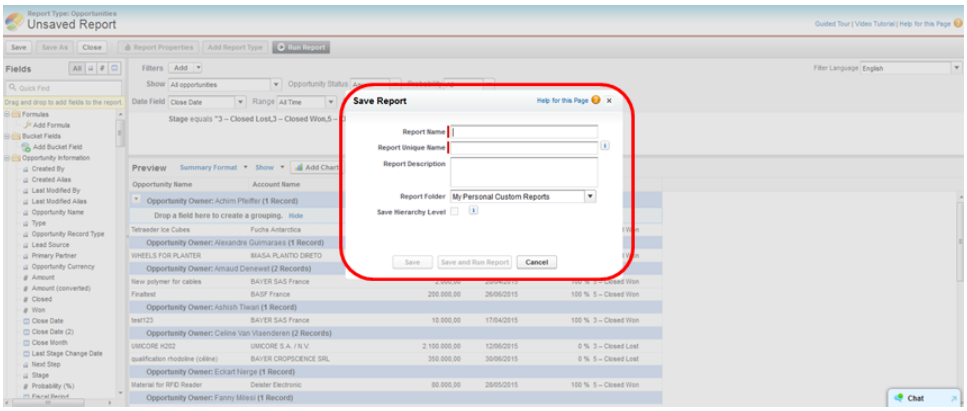


Saving the Report

•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.

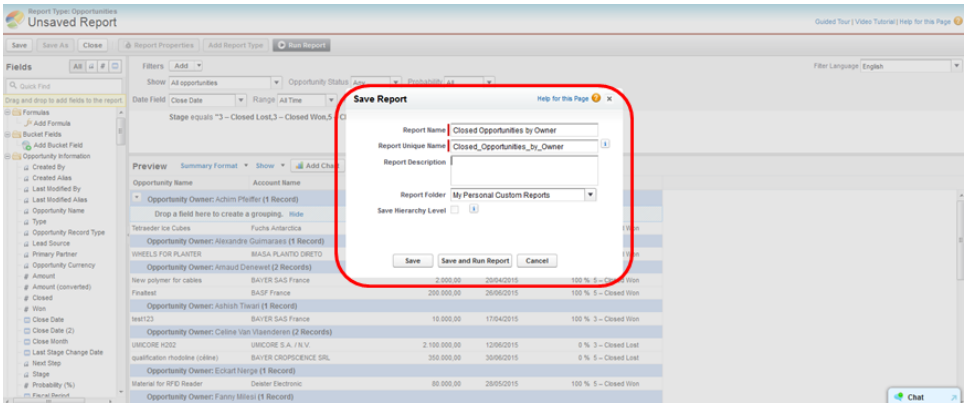


•The Save Report window opens and David will enter a Report Name and select a folder to save the report in.
•It's always recommended to save the report in the folder "My Personal Custom Reports" before saving it into another shared folder



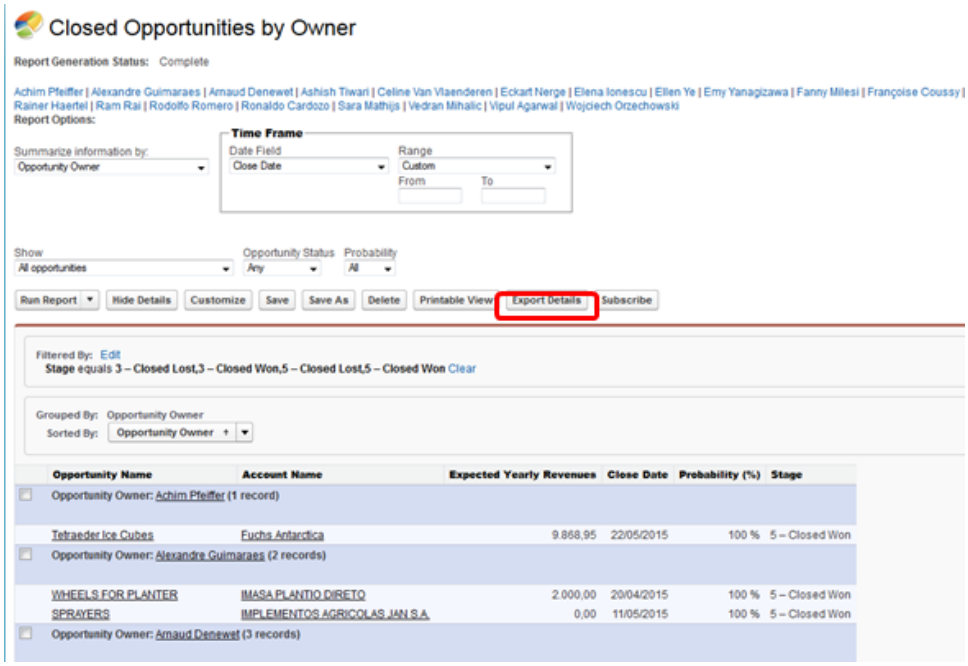
⚠ You must ONLY save your report in the folder “My Personal Custom Reports”

•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.

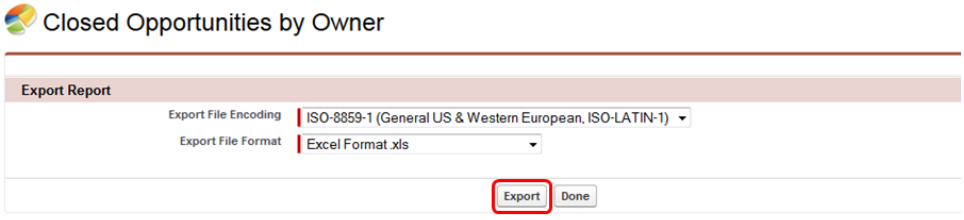


Exporting the Report to an excel file

•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.

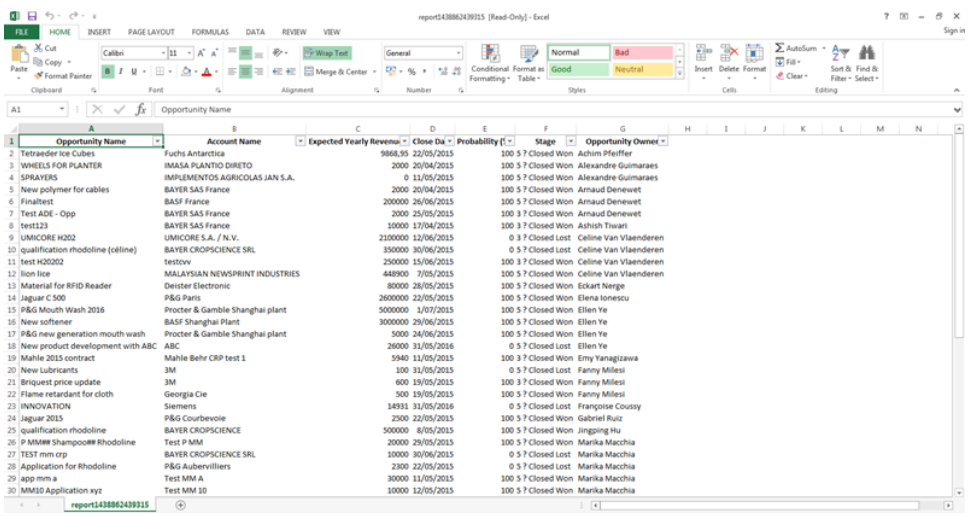


•He is transferred to a new window called Export Report.
•He clicks on the Export button.



Viewing the Report in the excel file

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

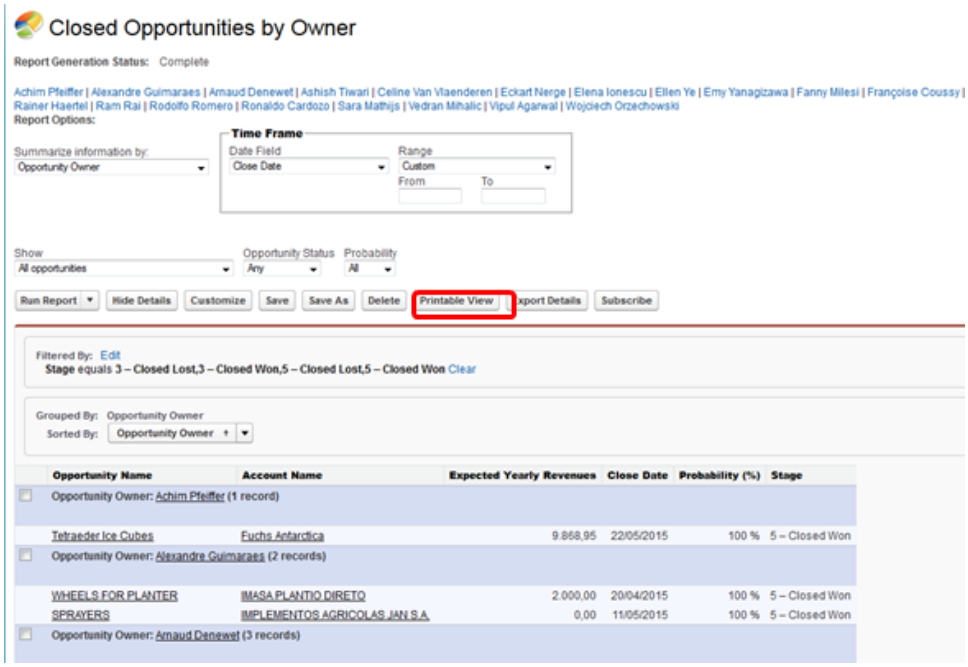


Opportunity Name	Account Name	Expected Yearly Revenue	Close Da	Probability (%	Stage	Opportunity Owner
Tetraeder Ice Cubes	Fuchs Antarctica	9868,95	22/05/2015	100	5 - Closed Won	Achim Pfeiffer
WHEELS FOR PLANTER	IMASA PLANTIO DIRETO	2000	20/04/2015	100	5 - Closed Won	Alexandre Guimaraes
SPRAYERS	IMPLEMENTOS AGRICOLAS JAN S.A.	0	11/05/2015	100	5 - Closed Won	Alexandre Guimaraes
New polymer for cables	BAYER SAS France	2000	20/04/2015	100	3 - Closed Won	Arnaud Denewet
Finaltest	BASF France	200000	26/06/2015	100	3 - Closed Won	Arnaud Denewet
Test ADE - Opp	BAYER SAS France	2000	25/05/2015	100	3 - Closed Won	Arnaud Denewet
test123	BAYER SAS France	10000	17/04/2015	100	3 - Closed Won	Ashish Tiwari
UMICORE H202	UMICORE S.A. / N.V.	2100000	12/06/2015	0	3 - Closed Lost	Celine Van Vlaenderen
qualification rhodoline (céline)	BAYER CROPSCIENCE SRL	350000	30/06/2015	0	5 - Closed Lost	Celine Van Vlaenderen
test H20202	testcrv	250000	15/06/2015	100	3 - Closed Won	Celine Van Vlaenderen
lion lice	MALAYSIAN NEWSPRINT INDUSTRIES	448900	7/05/2015	100	5 - Closed Won	Celine Van Vlaenderen
Material for RFID Reader	Deister Electronic	80000	28/05/2015	100	5 - Closed Won	Eckart Nerge
Jaguar C 500	P&G Paris	2600000	22/05/2015	100	5 - Closed Won	Elena Ionescu
P&G Mouth Wash 2016	Procter & Gamble Shanghai plant	5000000	1/07/2015	100	5 - Closed Won	Ellen Ye
New softener	BASF Shanghai Plant	3000000	29/06/2015	100	5 - Closed Won	Ellen Ye
P&G new generation mouth wash	Procter & Gamble Shanghai plant	5000	24/06/2015	100	5 - Closed Won	Ellen Ye
New product development with ABC	ABC	26000	31/05/2016	0	5 - Closed Lost	Ellen Ye
Mahle 2015 contract	Mahle Behr CRP test 1	5940	11/05/2015	100	3 - Closed Won	Emy Yanagizawa
New Lubricants	3M	100	31/05/2015	0	5 - Closed Lost	Fanny Milesi
Briquest price update	3M	600	19/05/2015	100	3 - Closed Won	Fanny Milesi
Flame retardant for cloth	Georgia Cie	500	19/05/2015	100	5 - Closed Won	Fanny Milesi
INNOVATION	Siemens	14931	31/05/2016	0	5 - Closed Lost	Françoise Coussy
Jaguar 2015	P&G Courbevoie	2500	22/05/2015	100	5 - Closed Won	Gabriel Ruiz
qualification rhodoline	BAYER CROPSCIENCE	500000	8/05/2015	100	5 - Closed Won	Jingping Hu
P MM## Shampoo## Rhodoline	Test P MM	20000	29/05/2015	100	5 - Closed Won	Marika Macchia
TEST mm crp	BAYER CROPSCIENCE SRL	10000	30/06/2015	0	5 - Closed Lost	Marika Macchia
Application for Rhodoline	P&G Aubervilliers	2300	22/05/2015	0	5 - Closed Lost	Marika Macchia
app mm a	Test MM A	30000	11/05/2015	100	5 - Closed Won	Marika Macchia
MM10 Application xyz	Test MM 10	10000	12/05/2015	100	5 - Closed Won	Marika Macchia

Exporting the Report to an excel file

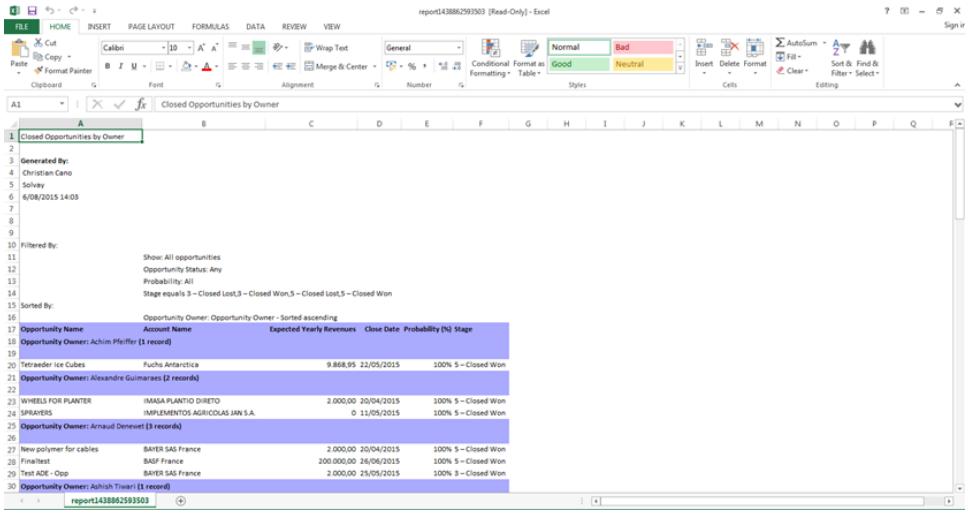
•David can also get a printable view of his report. For this, he clicks on Run Report to run the report on the whole database.

•Then David clicks on the button Printable View.



Viewing the Report in the excel file

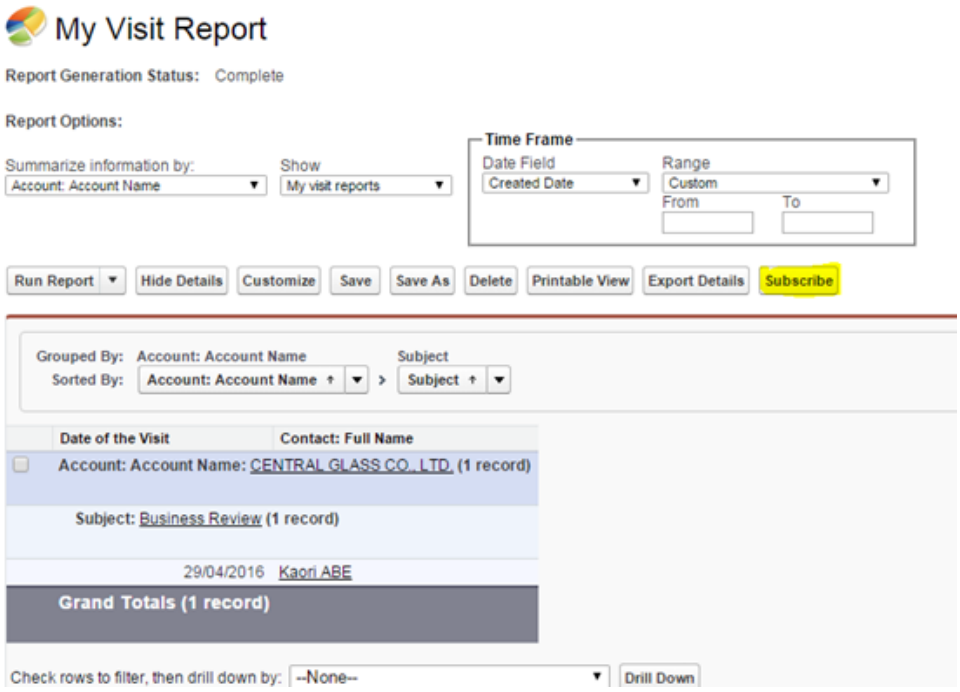
•The result is a more presentable table to print or show, but less easy to work with in Excel.

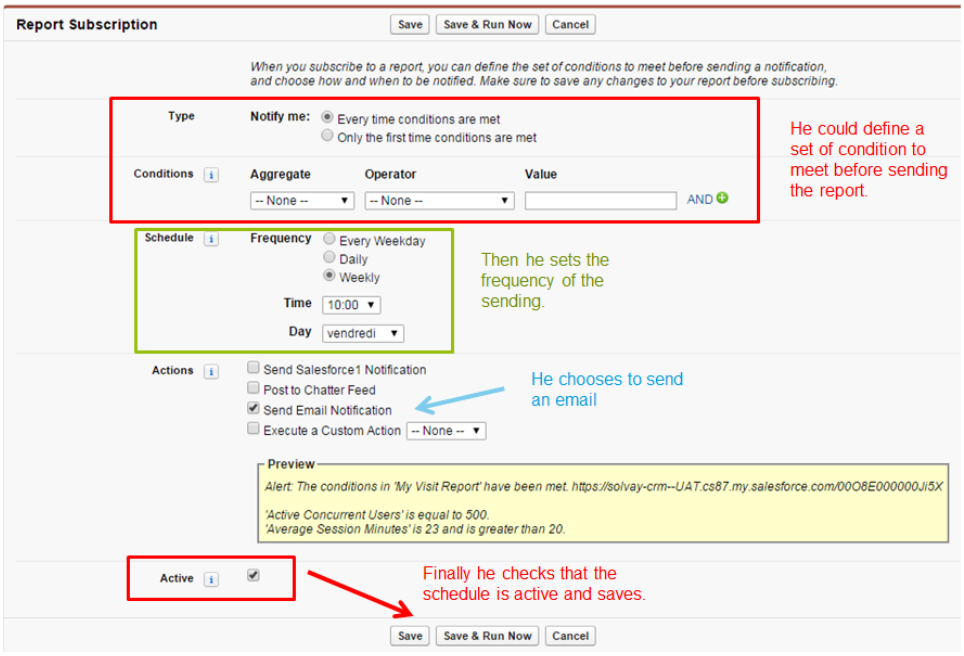


Closed Opportunities by Owner					
Generated By:					
Christian Cano					
Solvay					
6/08/2015 14:03					
Filtered By:					
	Show: All opportunities				
	Opportunity Status: Any				
	Probability: All				
	Stage equals 3 – Closed Lost,3 – Closed Won,5 – Closed Lost,5 – Closed Won				
Sorted By:					
	Opportunity Owner: Opportunity Owner - Sorted ascending				
Opportunity Name	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Opportunity Owner: Achim Pfeiffer (1 record)					
Tetraeder Ice Cubes	Fuchs Antarctica	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	11/05/2015	100%	5 – Closed Won
Opportunity Owner: Arnaud Denewet (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%	3 – Closed Won
Opportunity Owner: Ashish Tiwari (1 record)					

Subscribing to a report

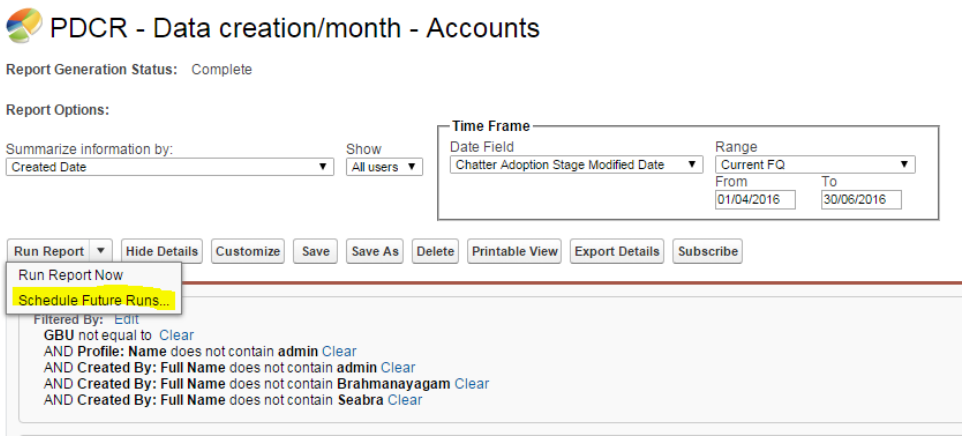
•David wants to receive automatically the report by email. To achieve this, he clicks on Subscribe.



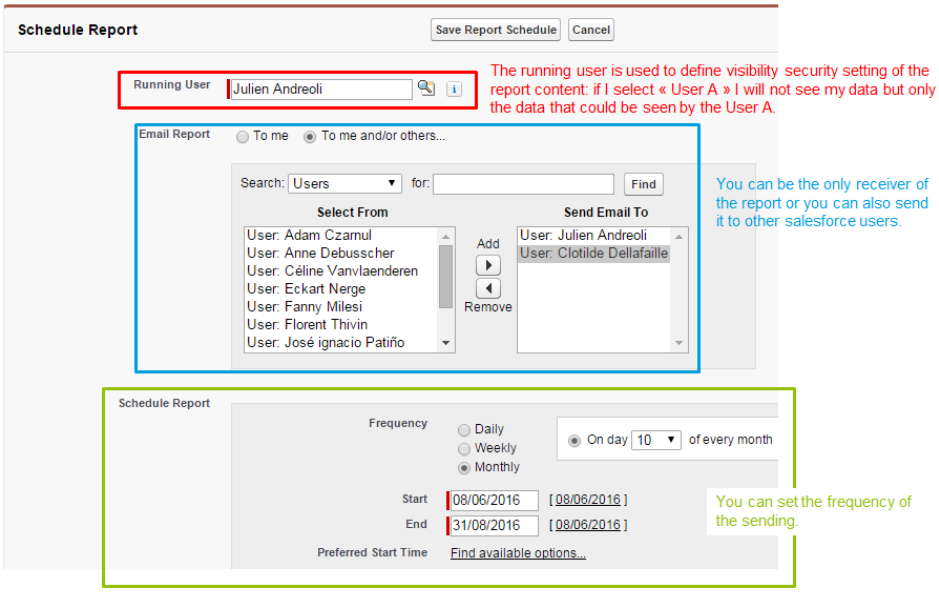


Wanting to schedule a report

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



Scheduling the sending of the report



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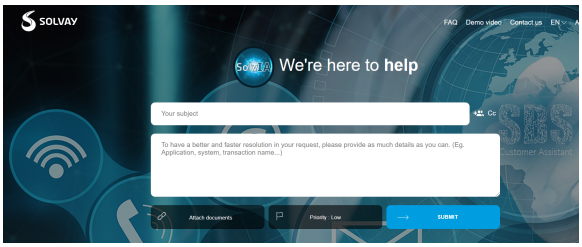
Related articles

- Introduction SFDC & Qlikview
- Qlikview - Analytics
- 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