

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

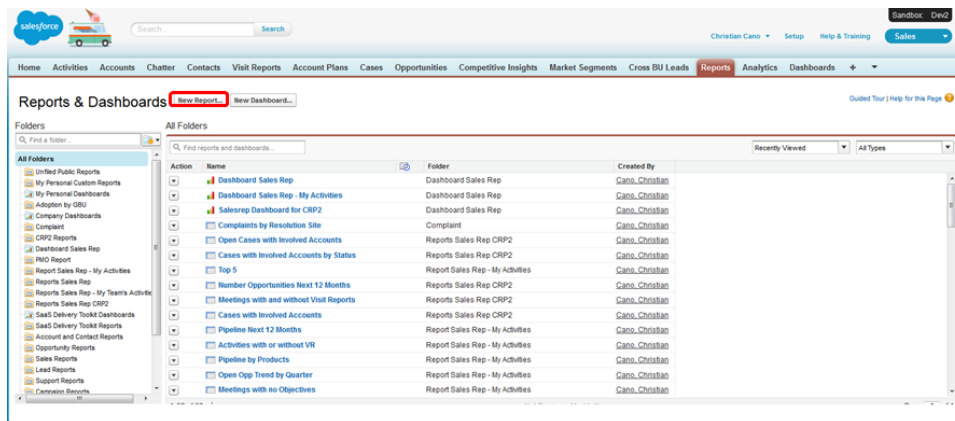
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Step By Step

Creating a Report

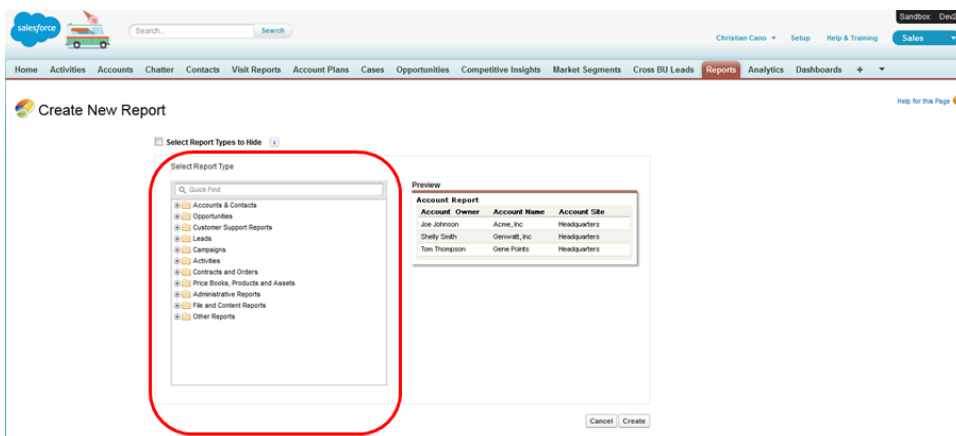
- David wants to prepare a report so he goes to the tab **Reports**.
- David *clicks* on **New Report**.



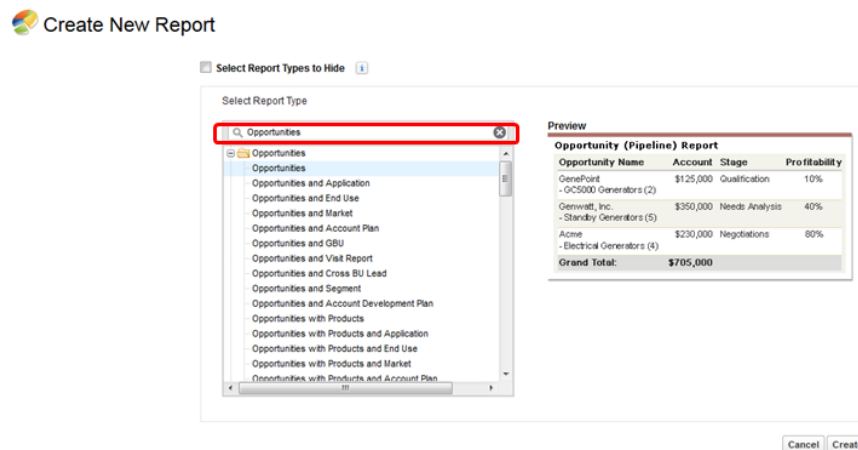
Selecting the Report Type

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

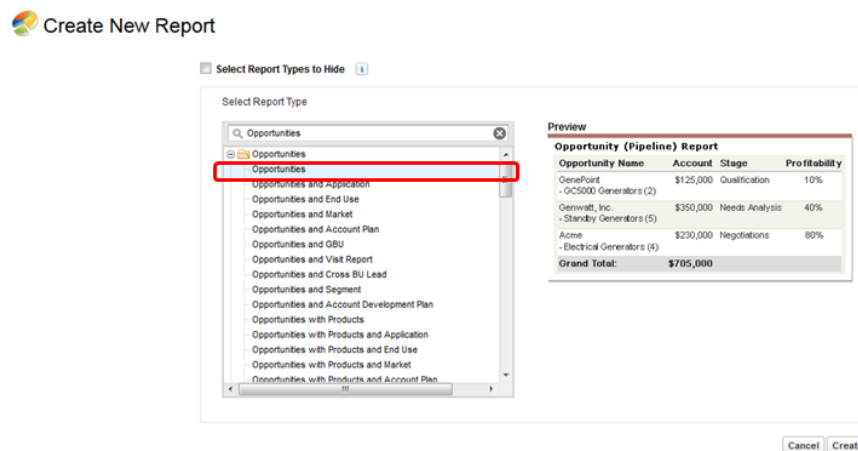
•Now he can *choose* from a number of **Report Types**



•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.



- 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.

[illegible]

Report Type: Opportunities

Unsaved Report

Guided Tour | Video Tutorials | Help for this Page

Save
Save As
Close
Report Properties
Add Report Type
Run Report

Fields

Account Name

Drag and drop to add fields to the report

Account General
Account Name
Account Custom Info
Account Name (Local Language)

Filters

Show: All opportunities
Opportunity Status: Any
Probability: All

Date Field: Close Date
Range: Current FG
From: 1/6/2015
To: 3/30/2015

Add filters, click Add

Filter Language: English

Preview
Tabular Format
Show
Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Close Date	Probability (%)	Stage
P&G Mouth Wash 2016	Ellen Ye	Procter & Gamble Shanghai plant	1/6/2015	100 %	5 - Closed Won
Testing Inno	Christian Cano	Pinto S.A.	3/6/2015	50 %	4 - Negotiate
Sell TECHNOL	Stefano Meazza	TEST - Meazza Spa	7/6/2015	30 %	2 - Lab Testing
Sell Wood	Stefano Meazza	TEST - Meazza Spa	14/6/2015	30 %	2 - Lab Testing
Open Concession slot	Stefano Meazza	TEST - CH99 Spa	14/6/2015	60 %	2 - Negotiate
Quaff (Biodin)	Pierre-Edouard Coubrer	Recell (biodin)	1/6/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALKER&KKA	15/6/2015	40 %	1 - Quality
Test opp	Christian Cano	VALEO SISTEMAS AUTOMOTIVOS LTD.	17/6/2015	40 %	3 - Industrial testing
Test11	Christian Cano	Pinto S.A.	17/6/2015	60 %	2 - Negotiate
Qualification Rhodine	Martina Macchia	BAYER CROSCIENCE SRL	22/6/2015	50 %	4 - Negotiate
new P&G-10 for Siemens China	Georges Houtappel	Siemens China	22/6/2015	40 %	1 - Quality
Qualification Rhodine	Christian Cano	BAYER CROSCIENCE SRL	23/6/2015	50 %	4 - Negotiate
JDA	Stefano Meazza	TEST - CH99 Spa	28/6/2015	60 %	2 - Negotiate
Huatai Motor CAC	Tony Song	LeQing Yucheng Electrical Co. Ltd	30/6/2015	60 %	3 - Industrial testing
TEST OPPY CONFECTION FOR GLAXIWEV	Anne Gilles	BAYER CROSCIENCE	30/6/2015	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.

Report Type: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All | Add

Filters: Add

Show: All opportunities Opportunity Status: Any Probability: All Filter Language: English

Date Field: Close Date Range: Current FQ From: 1/07/2015 To: 30/09/2015

To add filters, click Add.

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
map	Francisco Country	map	281,472.00	1/07/2015	20 %	1 - Quality
P&G Mouth Wash 2015	Ellen 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 TECHNVL	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	360.00	14/07/2015	60 %	2 - Negotiate
Qualif Rhodolite	Pierre-edouard Coudurier	Ruvell sensorier	400.00	15/07/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALTHENAMIA	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
Huatai Motor CAC	Tony Song	LiQing YuCheng Electrical Co. Ltd	0.00	30/07/2015	60 %	3 - Industrial testing
TEST OPPY CONFIDENTIAL for QLKVIEW	Anne Gilles	BAYER CROPSCIENCE	325,000.00	30/07/2015	40 %	3 - Industrial testing

Chat

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

Filters: Add

Show: All opportunities Opportunity Status: Any Probability: All

Date Field: Close Date Range: Current FQ From: 1/07/2015 To: 30/09/2015

To add filters, click Add.

Defining Report filters

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

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mnp	Françoise Cousy	mnp	281 472,00	1/07/2015	20 %	1 - Quality
P&G Mouth Wash 2015	Ellen 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 TECHNVL	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 - CH99 Spa	360,00	14/07/2015	60 %	2 - Negotiate
Qualif Rhodiline	Pierre-edouard Couturier	Reckitt benelux	400,00	15/07/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALNERAMKA	1 350 000,00	15/07/2015	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 Rhodiline	Marika Macchia	BAYER CROPSCIENCE SRL	3 500 000,00	22/07/2015	50 %	4 - Negotiate
new P&G-10 for Siemens China	Georges Houtappel	Siemens China	50 000,00	22/07/2015	40 %	1 - Quality
Qualification Rhodiline	Christian Cano	BAYER CROPSCIENCE SRL	4 018 000,00	23/07/2015	50 %	4 - Negotiate
JDA	Stefano Meazza	TEST - CH99 Spa	0,00	28/07/2015	60 %	2 - Negotiate
Hualat Motor CAC	Tony Song	LeQing YuCheng Electrical Co., Ltd	0,00	30/07/2015	60 %	3 - Industrial testing
TEST OPPY CONFIDENTIAL for OLKVIEW	Anne Giles	BAYER CROPSCIENCE	325 000,00	30/07/2015	40 %	3 - Industrial testing

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

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mnp	Françoise Cousy	mnp	281 472,00	1/07/2015	20 %	1 - Quality
P&G Mouth Wash 2015	Ellen 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 TECHNVL	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 - CH99 Spa	360,00	14/07/2015	60 %	2 - Negotiate
Qualif Rhodiline	Pierre-edouard Couturier	Reckitt benelux	400,00	15/07/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALNERAMKA	1 350 000,00	15/07/2015	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 Rhodiline	Marika Macchia	BAYER CROPSCIENCE SRL	3 500 000,00	22/07/2015	50 %	4 - Negotiate
new P&G-10 for Siemens China	Georges Houtappel	Siemens China	50 000,00	22/07/2015	40 %	1 - Quality
Qualification Rhodiline	Christian Cano	BAYER CROPSCIENCE SRL	4 018 000,00	23/07/2015	50 %	4 - Negotiate
JDA	Stefano Meazza	TEST - CH99 Spa	0,00	28/07/2015	60 %	2 - Negotiate
Hualat Motor CAC	Tony Song	LeQing YuCheng Electrical Co., Ltd	0,00	30/07/2015	60 %	3 - Industrial testing
TEST OPPY CONFIDENTIAL for OLKVIEW	Anne Giles	BAYER CROPSCIENCE	325 000,00	30/07/2015	40 %	3 - Industrial testing

- He selects all the stage that are **Closed** and clicks on **Insert Selected**.
- David now needs to click on **OK**.

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mnp	Françoise Cousy	mnp	281 472,00	1/07/2015	20 %	1 - Quality
P&G Mouth Wash 2015	Ellen 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 TECHNVL	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 - CH99 Spa	360,00	14/07/2015	60 %	2 - Negotiate
Qualif Rhodiline	Pierre-edouard Couturier	Reckitt benelux	400,00	15/07/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALNERAMKA	1 350 000,00	15/07/2015	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 Rhodiline	Marika Macchia	BAYER CROPSCIENCE SRL	3 500 000,00	22/07/2015	50 %	4 - Negotiate
new P&G-10 for Siemens China	Georges Houtappel	Siemens China	50 000,00	22/07/2015	40 %	1 - Quality
Qualification Rhodiline	Christian Cano	BAYER CROPSCIENCE SRL	4 018 000,00	23/07/2015	50 %	4 - Negotiate
JDA	Stefano Meazza	TEST - CH99 Spa	0,00	28/07/2015	60 %	2 - Negotiate
Hualat Motor CAC	Tony Song	LeQing YuCheng Electrical Co., Ltd	0,00	30/07/2015	60 %	3 - Industrial testing
TEST OPPY CONFIDENTIAL for OLKVIEW	Anne Giles	BAYER CROPSCIENCE	325 000,00	30/07/2015	40 %	3 - Industrial testing

Previewing the Report

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

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Contract renewal H202	Philippe Renier	BAYER SAS France	75,00	28/05/2015	100 %	3 - Closed Won
P MIMM Shampoo Rhodiline	Marika Macchia	Test P MIM	20 000,00	28/05/2015	100 %	5 - Closed Won
New Lubricants	Fanny Miesi	3M	100,00	31/05/2015	0 %	5 - Closed Lost
Test Opportunity	Vipul Agarwal	Test Sold To	1 000,00	13/04/2015	100 %	3 - Closed Won
test123	Ashish Tiwari	BAYER SAS France	10 000,00	17/04/2015	100 %	3 - Closed Won
Qualification Rhodiline	Philippe Renier	UMICORE S.A. / INV	15 000,00	28/05/2015	100 %	5 - Closed Won
New polymer for caplets	Arnaud Deneveest	BAYER SAS France	2 000,00	20/04/2015	100 %	3 - Closed Won
TEST mnp opp	Marika Macchia	BAYER CROPSCIENCE SRL	10 000,00	30/05/2015	0 %	5 - Closed Lost
SAPORAMM H202	Vedra Mhalic	SAPORAM d.s	1 000 000,00	27/05/2015	100 %	3 - Closed Won
Finaltest	Arnaud Deneveest	BASF France	200 000,00	26/06/2015	100 %	5 - Closed Won
UMICORE H202	Celine Van Vlanderen	UMICORE S.A. / INV	2 100 000,00	12/09/2015	0 %	3 - Closed Lost
Project Razoum - Coating	Philippe Renier	BAYER SAS France	8,00	10/04/2015	100 %	5 - Closed Won
qualification rhodiline (oilfree)	Celine Van Vlanderen	BAYER CROPSCIENCE SRL	350 000,00	30/05/2015	0 %	5 - Closed Lost
Test	Ram Rai	ABC	180,00	4/05/2015	100 %	5 - Closed Won
Jaeger 2015	Gabriel Ruiz	P&G Courbevoie	2 500,00	22/05/2015	100 %	5 - Closed Won
Qualification H202	Philippe Renier	BAYER	14 850,00	25/05/2015	0 %	3 - Closed Lost

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**.

Report Type: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All | + | - |

Quick Find:

Drag and drop to add fields to the report

Fields:

- Opportunity Information
 - Opportunity Name
 - Opportunity Record Type
 - Lead Source
 - Primary Partner
 - Opportunity Currency
 - Amount
 - Amount (converted)
 - Closed
 - Win
 - Close Date
 - Close Date (2)
 - Close Month
 - Last Stage Change Date
 - Next Step
 - Stage
 - Probability (%)
 - Forecast Period
 - Forecast Year
- Created By
- Last Modified By
- Last Modified Date
- Type
- Opportunity Record Type
- Lead Source
- Primary Partner
- Opportunity Currency
- Amount
- Amount (converted)
- Closed
- Win
- Close Date
- Close Date (2)
- Close Month
- Last Stage Change Date
- Next Step
- Stage
- Probability (%)
- Forecast Period
- Forecast Year

Filters: Add +

Show: All opportunities Opportunity Status: Any Probability: All

Date Field: Close Date Range: All Time From: To:

Stage equals 3 - Closed Lost, 3 - Closed Won, 5 - Closed Lost, 5 - Closed Won

Preview Tabular Format Show Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Contract renewal HQ02	Philippe Renier	Philippe Renier	75.00	28/05/2015	100 %	3 - Closed Won
P MBM# Shampoo# Rhodoline	Marika Macchia	Marika Macchia	20.000.00	29/05/2015	100 %	5 - Closed Won
New Lubricants	Fanny Missi	Fanny Missi	100.00	31/05/2015	0 %	5 - Closed Lost
Test Opportunity	Vipul Agarwal	Vipul Agarwal	1.000.00	13/04/2015	100 %	3 - Closed Won
test123	Ashish Tiwari	Ashish Tiwari	10.000.00	17/04/2015	100 %	3 - Closed Won
Qualification Rhodoline	Philippe Renier	Philippe Renier	16.000.00	28/05/2015	100 %	5 - Closed Won
New polymer for cables	Amraud Denewet	Amraud Denewet	2.000.00	20/04/2015	100 %	5 - Closed Won
TEST run op	Marika Macchia	Marika Macchia	10.000.00	30/06/2015	0 %	5 - Closed Lost
SAPONIARHQ02	Verdran Mihalic	Verdran Mihalic	1.000.000.00	27/05/2015	100 %	3 - Closed Won
Finaltest	Amraud Denewet	BASF France	200.000.00	26/06/2015	100 %	5 - Closed Won
UMCORE HQ02	Celine Van Vlaenderen	UMCORE S.A. /N.V.	2.100.000.00	12/06/2015	0 %	3 - Closed Lost
Project Racumin - Coating	Philippe Renier	BAVER SAS France	0.00	7/04/2015	100 %	5 - Closed Won
qualification modoline (colline)	Celine Van Vlaenderen	BAVER CROPSOENCE SRL	350.000.00	30/06/2015	0 %	5 - Closed Lost
Test	Ram Rai	ABC	180.00	4/05/2015	100 %	5 - Closed Won
Jaguar 2015	Gabriel Ruiz	P&G Courtbeville	2.500.00	22/05/2015	100 %	5 - Closed Won
Qualification HQ02	Philippe Renier	BAVER	14.850.00	25/05/2015	0 %	3 - Closed Lost

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Chat

•David can see the result in the Preview section.

Report Type: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All | + | - |

Quick Find:

Drag and drop to add fields to the report

Fields:

- Opportunity Information
 - Opportunity Name
 - Opportunity Record Type
 - Lead Source
 - Primary Partner
 - Opportunity Currency
 - Amount
 - Amount (converted)
 - Closed
 - Win
 - Close Date
 - Close Date (2)
 - Close Month
 - Last Stage Change Date
 - Next Step
 - Stage
 - Probability (%)
 - Forecast Period
 - Forecast Year
- Created By
- Last Modified By
- Last Modified Date
- Type
- Opportunity Record Type
- Lead Source
- Primary Partner
- Opportunity Currency
- Amount
- Amount (converted)
- Closed
- Win
- Close Date
- Close Date (2)
- Close Month
- Last Stage Change Date
- Next Step
- Stage
- Probability (%)
- Forecast Period
- Forecast Year

Filters: Add +

Show: All opportunities Opportunity Status: Any Probability: All

Date Field: Close Date Range: All Time From: To:

Stage equals 3 - Closed Lost, 3 - Closed Won, 5 - Closed Lost, 5 - Closed Won

Preview Summary Format Show Add Chart Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Opportunity Owner: Achim Pfeiffer (1 Record)						
Drop a field here to create a grouping. Hide						
Testrunner ice Cubes	Fuchs Antarcica	Fuchs Antarcica	9.888.95	22/05/2015	100 %	5 - Closed Won
Opportunity Owner: Alexandre Guimaraes (1 Record)						
WHEELS FOR PLANTER	MAISA PLANTIO DIRETO	MAISA PLANTIO DIRETO	2.000.00	20/04/2015	100 %	5 - Closed Won
Opportunity Owner: Amaud Denewet (2 Records)						
New polymer for cables	BAVER SAS France	BAVER SAS France	2.000.00	20/04/2015	100 %	5 - Closed Won
Finaltest	BASF France	BASF France	200.000.00	26/06/2015	100 %	5 - Closed Won
Opportunity Owner: Ashish Tiwari (1 Record)						
test123	BAVER SAS France	BAVER SAS France	10.000.00	17/04/2015	100 %	3 - Closed Won
Opportunity Owner: Celine Van Vlaenderen (2 Records)						
UMCORE HQ02	UMCORE S.A. /N.V.	UMCORE S.A. /N.V.	2.100.000.00	12/06/2015	0 %	3 - Closed Lost
qualification modoline (colline)	BAVER CROPSOENCE SRL	BAVER CROPSOENCE SRL	350.000.00	30/06/2015	0 %	5 - Closed Lost
Opportunity Owner: Eckart Torge (1 Record)						
Manover for RFO Reader	Deezer Electronic	Deezer Electronic	80.000.00	29/05/2015	100 %	5 - Closed Won
Opportunity Owner: Fanny Missi (1 Record)						

Chat

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.

Report Type: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All | + | - |

Quick Find:

Drag and drop to add fields to the report

Fields:

- Opportunity Information
 - Opportunity Name
 - Opportunity Record Type
 - Lead Source
 - Primary Partner
 - Opportunity Currency
 - Amount
 - Amount (converted)
 - Closed
 - Win
 - Close Date
 - Close Date (2)
 - Close Month
 - Last Stage Change Date
 - Next Step
 - Stage
 - Probability (%)
 - Forecast Period
 - Forecast Year
- Created By
- Last Modified By
- Last Modified Date
- Type
- Opportunity Record Type
- Lead Source
- Primary Partner
- Opportunity Currency
- Amount
- Amount (converted)
- Closed
- Win
- Close Date
- Close Date (2)
- Close Month
- Last Stage Change Date
- Next Step
- Stage
- Probability (%)
- Forecast Period
- Forecast Year

Filters: Add +

Show: All opportunities Opportunity Status: Any Probability: All

Date Field: Close Date Range: All Time From: To:

Stage equals 3 - Closed Lost, 3 - Closed Won, 5 - Closed Lost, 5 - Closed Won

Preview Tabular Format Show Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Contract renewal HQ02	Philippe Renier	BAVER SAS France	75.00	28/05/2015	100 %	3 - Closed Won
P MBM# Shampoo# Rhodoline	Marika Macchia	Test P MBM	20.000.00	29/05/2015	100 %	3 - Closed Won
New Lubricants	Fanny Missi	3M	100.00	31/05/2015	0 %	5 - Closed Lost
Test Opportunity	Vipul Agarwal	Test Sold To	1.000.00	13/04/2015	100 %	3 - Closed Won
test123	Ashish Tiwari	BAVER SAS France	10.000.00	17/04/2015	100 %	3 - Closed Won
Qualification Rhodoline	Philippe Renier	UMCORE S.A. /N.V.	16.000.00	28/05/2015	100 %	5 - Closed Won
New polymer for cables	Amraud Denewet	BAVER SAS France	2.000.00	20/04/2015	100 %	5 - Closed Won
TEST run op	Marika Macchia	BAVER CROPSOENCE SRL	10.000.00	30/06/2015	0 %	5 - Closed Lost
SAPONIARHQ02	Verdran Mihalic	SAPONIA S.d.	1.000.000.00	27/05/2015	100 %	3 - Closed Won
Finaltest	Amraud Denewet	BASF France	200.000.00	26/06/2015	100 %	5 - Closed Won
UMCORE HQ02	Celine Van Vlaenderen	UMCORE S.A. /N.V.	2.100.000.00	12/06/2015	0 %	3 - Closed Lost
Project Racumin - Coating	Philippe Renier	BAVER SAS France	0.00	7/04/2015	100 %	5 - Closed Won
qualification modoline (colline)	Celine Van Vlaenderen	BAVER CROPSOENCE SRL	350.000.00	30/06/2015	0 %	5 - Closed Lost
Test	Ram Rai	ABC	180.00	4/05/2015	100 %	5 - Closed Won
Jaguar 2015	Gabriel Ruiz	P&G Courtbeville	2.500.00	22/05/2015	100 %	5 - Closed Won
Qualification HQ02	Philippe Renier	BAVER	14.850.00	25/05/2015	0 %	3 - Closed Lost

Chat

- 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

Save Report

Report Name

Report Unique Name

Report Description

Report Folder: My Personal Custom Reports

Save Hierarchy Level: ☐

Save Save and Run Report Cancel

Opportunity Name	Account Name	Amount	Close Date	Close Date (2)	Close Won	Next Step	Stage	Probability (%)	Forecast Period
Opportunity Owner: Action Pfler (1 Record)									
Drop a field here to create a grouping. Help									
Tender for Cubes	Fuchs Antarctica								
Opportunity Owner: Alexandre Guimaraes (1 Record)									
WHEELS FOR PLASTER	MASA PLANTO DIRETO								
Opportunity Owner: Arnaud Deneuvel (2 Records)									
New polymer for cables	BAUER SAS France	2 100 000,00	29/02/2015		100 %	3 - Closed Won			
Feedbox	BAUP France	200 000,00	26/06/2015		100 %	5 - Closed Won			
Opportunity Owner: Ashish Tiwari (1 Record)									
test123	BAUER SAS France	10 000,00	17/04/2015		100 %	3 - Closed Won			
Opportunity Owner: Celine Van Vliet (2 Records)									
UNICORE H202	UNICORE S.A. / N.V.	2 100 000,00	13/06/2015		0 %	3 - Closed Lost			
qualification machine (initial)	BAUER DRIPSCHENCE SRL	300 000,00	30/06/2015		0 %	5 - Closed Lost			
Opportunity Owner: Eckart Hergel (1 Record)									
Material for RFID Reader	Deister Electronic	80 000,00	25/05/2015		100 %	5 - Closed Won			
Opportunity Owner: Fanny Millec (1 Record)									





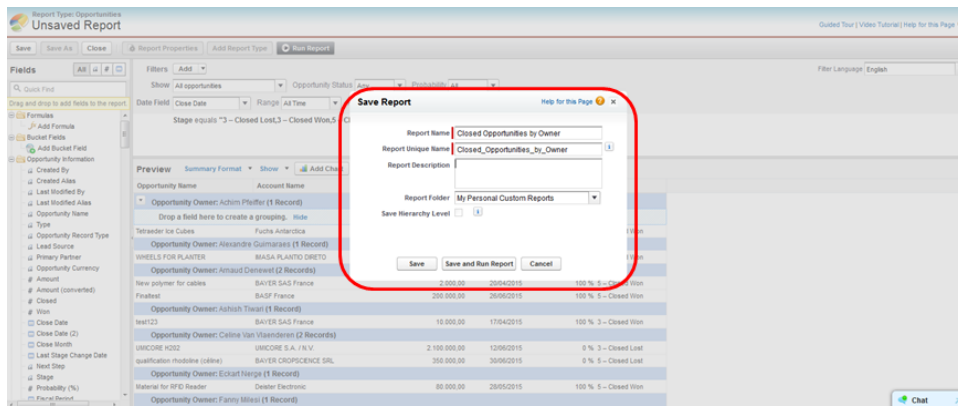
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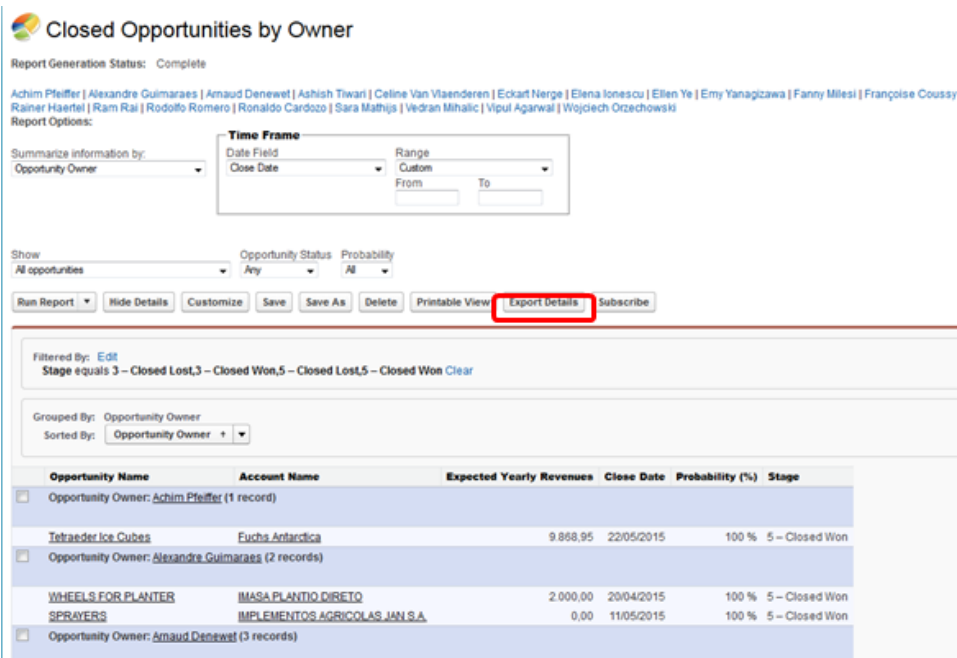
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•David enters "Closed Opportunities by Owner" as the Report Name.
 •He chooses where the report should be saved. He selects the Report Folder "My Personal Custom Reports".
 •Then he clicks Save.

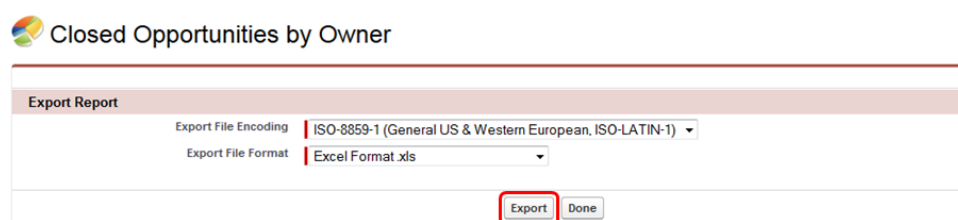


Exporting the Report to an excel file

•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.

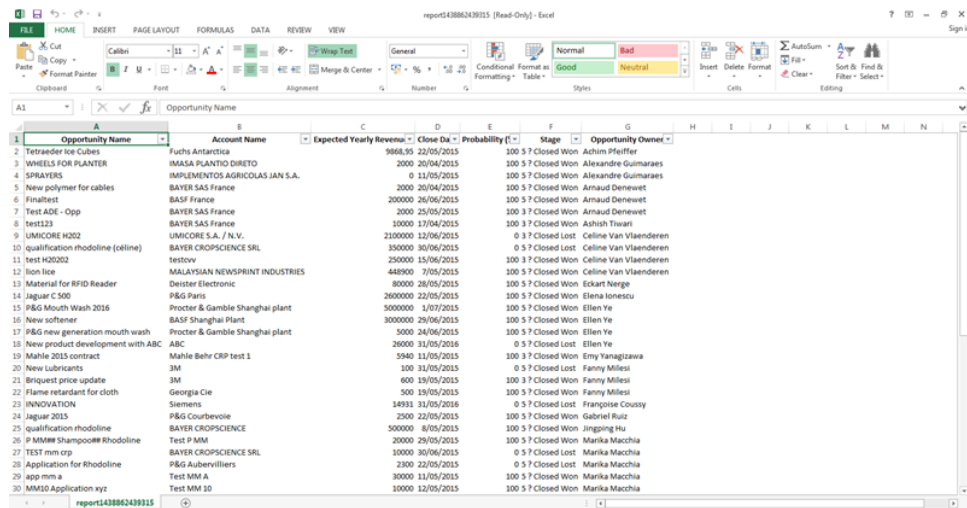


•He is transferred to a new window called Export Report.
 •He clicks on the Export button.



Viewing the Report in the excel file

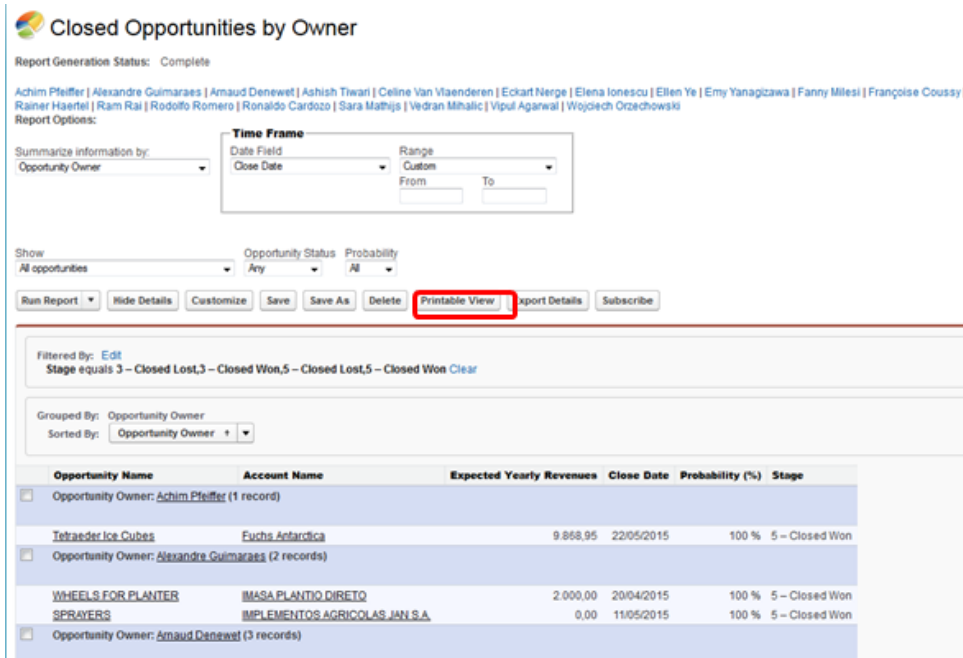
•He now has an excel file with all the data available from Salesforce.



Opportunity Name	Account Name	Expected Yearly Revenue	Close Date	Probability	Opportunity Owner
Tetraeder Ice Cubes	Fuchs Antartica	9868,95	22/05/2015	100 %	5 - Closed Won
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
New polymer for cables	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
Finaltest	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
Test ADE - Opp	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
test123	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
LMICORE H202	LMICORE S.A. / N.V.	2100000	12/06/2015	0 %	5 - Closed Lost
qualification rhodoline (oline)	BAYER CROSCIENCE SRL	350000	30/06/2015	0 %	5 - Closed Lost
test H20202	testov	250000	15/06/2015	100 %	5 - Closed Won
Iron Ice	MALESIAN NEWSPRINT INDUSTRIES	448000	7/05/2015	100 %	5 - Closed Won
Material for RFID Reader	Devster Electronic	80000	28/05/2015	100 %	5 - Closed Won
Jaguar C 500	P&G Paris	2600000	22/05/2015	100 %	5 - Closed Won
P&G Mouth Wash 2016	Procter & Gamble Shanghai plant	3000000	1/07/2015	100 %	5 - Closed Won
New softener	BASF Shanghai Plant	3000000	29/06/2015	100 %	5 - Closed Won
P&G new generation mouth wash	Procter & Gamble Shanghai plant	6000	24/06/2015	100 %	5 - Closed Won
New product development with ABC	ABC	26000	31/05/2016	0 %	5 - Closed Lost
Mahle 2015 contract	Mahle Behr CRP test 1	5940	11/05/2015	100 %	5 - Closed Won
New lubricants	3M	600	28/05/2015	100 %	5 - Closed Won
Best price update	3M	500	15/05/2015	100 %	5 - Closed Won
Flame retardant for cloth	Georgia Cie	14931	31/05/2016	0 %	5 - Closed Lost
INNOVATION	Siemens	2000	22/05/2015	100 %	5 - Closed Won
Jaguar 2015	P&G Courbevoie	500000	8/05/2015	100 %	5 - Closed Won
qualification rhodoline	BAYER CROSCIENCE	20000	29/05/2015	100 %	5 - Closed Won
P MMW Shampoo Rhodoline	Test P MM	10000	30/06/2015	0 %	5 - Closed Lost
TEST mm rrp	BAYER CROSCIENCE SRL	10000	30/06/2015	0 %	5 - Closed Lost
Application for Rhodoline	P&G Aubervilliers	2.000	22/05/2015	0 %	5 - Closed Lost
app mm a	Test MM A	30000	12/05/2015	100 %	5 - Closed Won
MMIS Application xyz	Test MM IS	10000	12/05/2015	100 %	5 - Closed Won

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.



Closed Opportunities by Owner

Report Generation Status: Complete

Achim Pfeiffer | Alexandre Guimaraes | Amaud Denewet | Ashish Tiwari | Celine Van Vlaenderen | Eckart Nerge | Elena Ionescu | Ellen Ye | Emy Yanagizawa | Fanny Milesi | Françoise Coussey | Rainer Haefel | Ram Rai | Rodolfo Romero | Ronaldo Cardozo | Sara Mathys | Vedran Mihalic | Vipul Agarwal | Wojciech Orzechowski

Report Options:

Summarize information by: Opportunity Owner

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

Show: All opportunities, Opportunity Status: Any, Probability: All

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

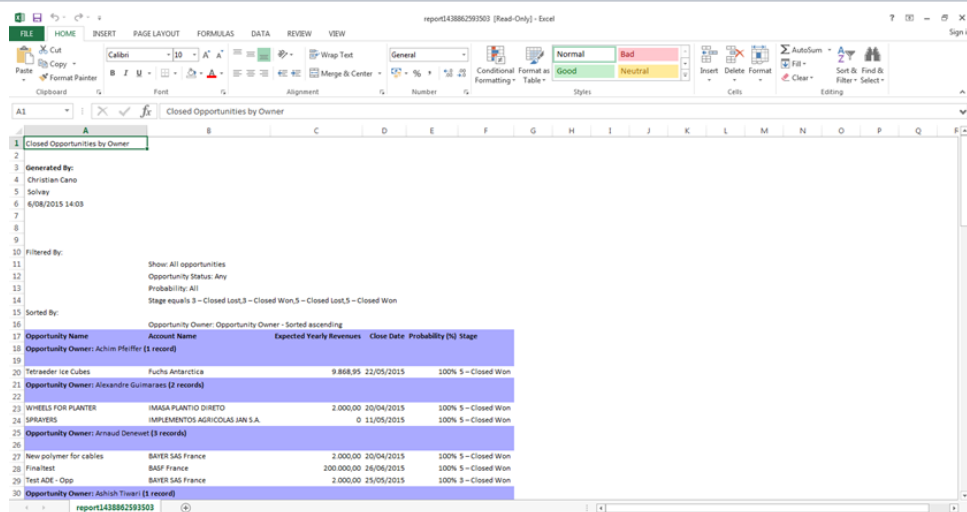
Filtered By: Edit, Stage equals 3 - Closed Lost, 3 - Closed Won, 5 - Closed Lost, 5 - Closed Won Clear

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: Amaud Denewet (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: Amaud Denewet (3 records)					
New polymer for cables	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
Finaltest	BAYER SAS France	2.000,00	20/04/2015	100 %	5 - Closed Won
Test ADE - Opp	BAYER SAS France	2.000,00	20/04/2015	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: CENTRAL GLASS CO. LTD. (1 record)

Subject: Business Review (1 record)

29/04/2016 Kaori ABE

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

Operator

Value

-- None --

-- None --

AND

Schedule

Frequency

☐ Every Weekday

☐ Daily

☒ Weekly

Time

10:00

Day

vendredi

Then he sets the frequency of the sending.

Actions

☐ Send Salesforce1 Notification

☐ Post to Chatter Feed

☒ Send Email Notification

☐ Execute a Custom Action -- None --

He chooses to send an email

Preview

Alert: The conditions in 'My Visit Report' have been met. <https://solway-crm--UAT.cs87.my.salesforce.com/00O8E000000Jl5X>

'Active Concurrent Users' is equal to 500.

'Average Session Minutes' is 23 and is greater than 20.

Active

☒

Finally he checks that the schedule is active and saves.

Save

Save & Run Now

Cancel

He could define a set of condition to meet before sending the report.

Wanting to schedule a report

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

PDCR - Data creation/month - Accounts

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Range:

From: To:

Buttons: Run Report, Hide Details, Customize, Save, Save As, Delete, Printable View, Export Details, Subscribe

Run Report Now

Schedule Future Runs...

Filtered By: Edit

- GBU not equal to [Clear](#)
- AND Profile: Name does not contain [admin](#) [Clear](#)
- AND Created By: Full Name does not contain [admin](#) [Clear](#)
- AND Created By: Full Name does not contain [Brahmanayagam](#) [Clear](#)
- AND Created By: Full Name does not contain [Seabra](#) [Clear](#)

Scheduling the sending of the report

Schedule Report

Buttons: Save Report Schedule, Cancel

Running User: [Clear](#)

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: Users for: Find

Select From

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

Add Remove

Send Email To

- User: Julien Andreoli
- User: Clotilde Dellafaille

Frequency: ☐ Daily ☐ Weekly ☒ Monthly

On day of every month

Start: [\[08/06/2016 \]](#)

End: [\[08/06/2016 \]](#)

Preferred Start Time: [Find available options...](#)

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

You can set the frequency of the sending.

[Back to the top](#)

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.](#)

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SOLVIA

We're here to help

Your subject:

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name,...)

Attach documents Priority: Low [SUBMIT](#)

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