

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

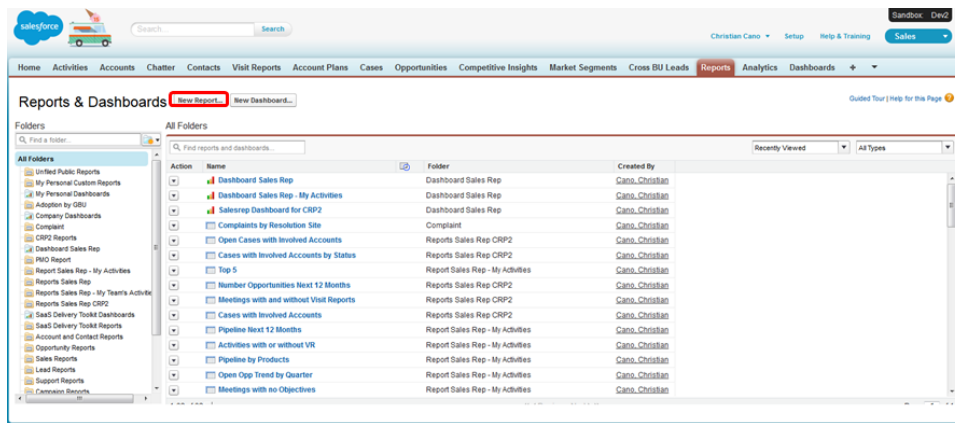
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Step By Step

Creating a Report

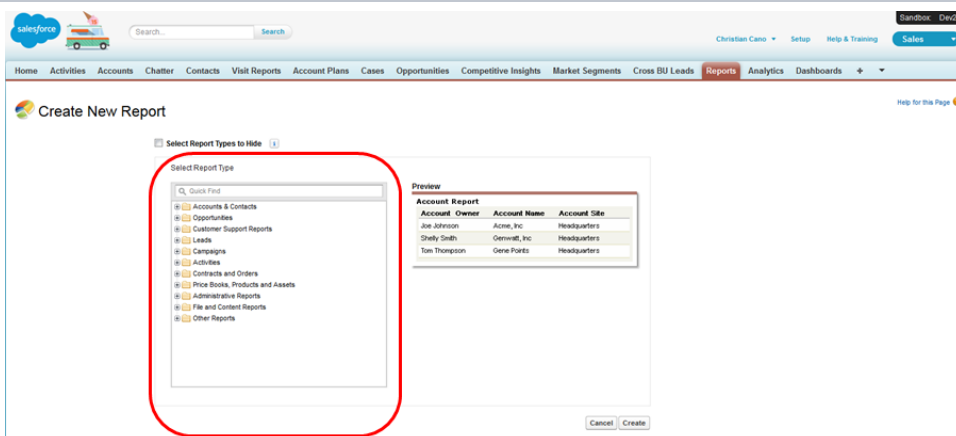
- David wants to prepare a report so he goes to the tab **Reports**.
- David *clicks* on **New Report**.



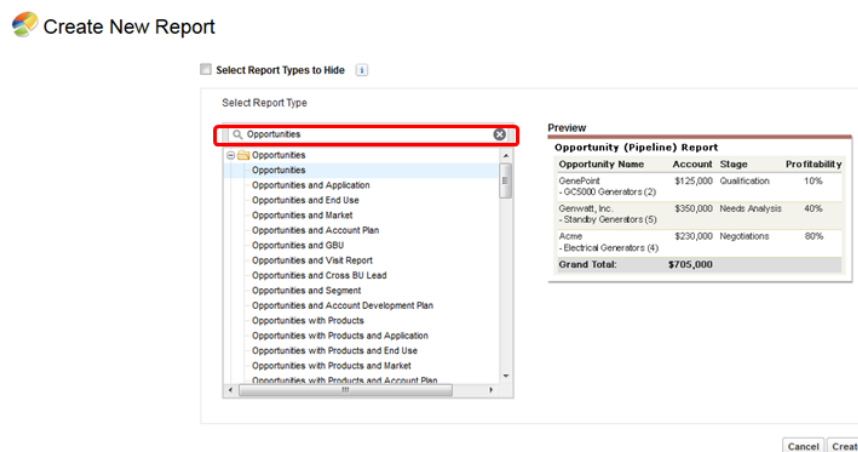
Selecting the Report Type

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

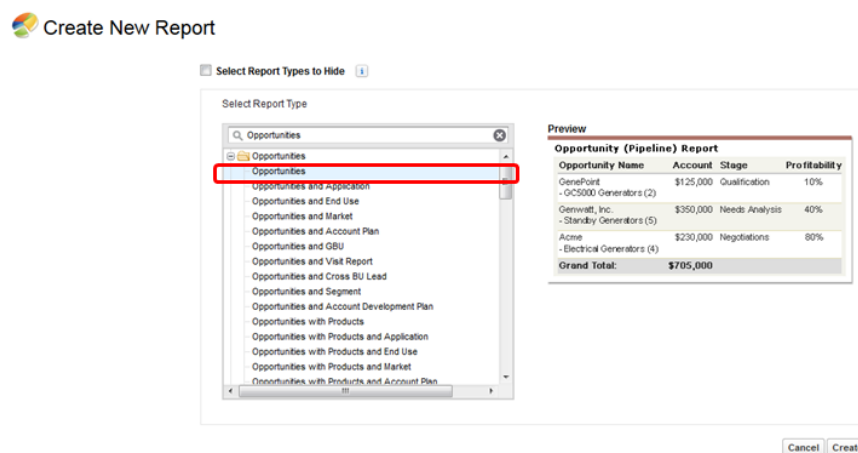
•Now he can *choose* from a number of **Report Types**



•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

The screenshot shows the 'Report Types: Opportunities' interface. A red box highlights the 'Fields' panel on the left, which contains a list of fields to be added to the report. Another red box highlights the 'Preview' table on the right, which displays a list of opportunities. A speech bubble points to the top right area, indicating the 'Zone to add filters and selection to precise the report'. Another speech bubble points to the 'Preview' table, indicating the 'Preview of the results'.

Fields Panel:

- Account Name
- Opportunity Name
- Opportunity Owner
- Opportunity Status
- Opportunity Stage
- Opportunity Probability
- Opportunity Amount
- Opportunity Close Date
- Opportunity Lead Source
- Opportunity Test Type
- Opportunity Test Result
- Opportunity Test Date
- Opportunity Test Location
- Opportunity Test Equipment
- Opportunity Test Operator
- Opportunity Test Supervisor
- Opportunity Test Engineer
- Opportunity Test Technician
- Opportunity Test Assistant
- Opportunity Test Intern
- Opportunity Test Student
- Opportunity Test Trainee
- Opportunity Test Apprentice
- Opportunity Test Journeyman
- Opportunity Test Master
- Opportunity Test Expert
- Opportunity Test Specialist
- Opportunity Test Consultant
- Opportunity Test Advisor
- Opportunity Test Analyst
- Opportunity Test Researcher
- Opportunity Test Scientist
- Opportunity Test Engineer
- Opportunity Test Technician
- Opportunity Test Assistant
- Opportunity Test Intern
- Opportunity Test Student
- Opportunity Test Trainee
- Opportunity Test Apprentice
- Opportunity Test Journeyman
- Opportunity Test Master
- Opportunity Test Expert
- Opportunity Test Specialist
- Opportunity Test Consultant
- Opportunity Test Advisor
- Opportunity Test Analyst
- Opportunity Test Researcher
- Opportunity Test Scientist

Preview Table:

Opportunity Name	Opportunity Owner	Account Name	Close Date	Probability (%)	Stage
ING	FRANCESCO CROCI	ING	10/7/2015	20%	1 - Lead
P&G Mouth Wash 2015	Ellen 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 TECHVIL	Stefano Meazza	TEST - Meazza Spa	7/07/2015	30%	2 - Lab Testing
Open Consignment stock	Stefano Meazza	TEST - CHNS Spa	14/07/2015	60%	2 - Negotiate
Qualif Rhodoline	Pierre-edouard Couturier	Recollit benicorser	15/07/2015	50%	4 - Negotiate
Air space ceramics	Christian Cano	BALTHERABKA	16/07/2015	40%	1 - Quality
test opp	Christian Cano	VALEO SISTEMAS AUTOMOTIVOS LTD.	17/07/2015	40%	3 - Industrial testing
Test111	Christian Cano	Pinto S.A.	17/07/2015	60%	2 - Negotiate
Qualification Rhodoline	Marina Macchia	BAKER CROPSCIENCE SRL	22/07/2015	50%	4 - Negotiate
new P&G-10 for Siemens China	Georgios Houdappi	Siemens China	22/07/2015	40%	1 - Quality
Qualification Rhodoline	Christian Cano	BAKER CROPSCIENCE SRL	23/07/2015	50%	4 - Negotiate
JDA	Stefano Meazza	TEST - CHNS Spa	28/07/2015	60%	2 - Negotiate
Huatai Motor CAC	Tony Song	LeGing YuCheng Electrical Co.Ltd	30/07/2015	60%	3 - Industrial testing
TEST OPPY CONFIDENTIAL for GLKVIEW	Anne Gilles	BAKER CROPSCIENCE	30/07/2015	40%	3 - Industrial testing

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.

The screenshot shows the 'Report Types: Opportunities' interface. A red box highlights the 'Fields' panel on the left, which contains a list of fields to be added to the report. Another red box highlights the 'Preview' table on the right, which displays a list of opportunities. A red box highlights the 'Fields' panel on the left, which contains a list of fields to be added to the report. A red box highlights the 'Preview' table on the right, which displays a list of opportunities.

Fields Panel:

- Account Name
- Opportunity Name
- Opportunity Owner
- Opportunity Status
- Opportunity Stage
- Opportunity Probability
- Opportunity Amount
- Opportunity Close Date
- Opportunity Lead Source
- Opportunity Test Type
- Opportunity Test Result
- Opportunity Test Date
- Opportunity Test Location
- Opportunity Test Equipment
- Opportunity Test Operator
- Opportunity Test Supervisor
- Opportunity Test Engineer
- Opportunity Test Technician
- Opportunity Test Assistant
- Opportunity Test Intern
- Opportunity Test Student
- Opportunity Test Trainee
- Opportunity Test Apprentice
- Opportunity Test Journeyman
- Opportunity Test Master
- Opportunity Test Expert
- Opportunity Test Specialist
- Opportunity Test Consultant
- Opportunity Test Advisor
- Opportunity Test Analyst
- Opportunity Test Researcher
- Opportunity Test Scientist

Preview Table:

Opportunity Name	Opportunity Owner	Account Name	Close Date	Probability (%)	Stage
ING	FRANCESCO CROCI	ING	10/7/2015	20%	1 - Lead
P&G Mouth Wash 2015	Ellen 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 TECHVIL	Stefano Meazza	TEST - Meazza Spa	7/07/2015	30%	2 - Lab Testing
Open Consignment stock	Stefano Meazza	TEST - CHNS Spa	14/07/2015	60%	2 - Negotiate
Qualif Rhodoline	Pierre-edouard Couturier	Recollit benicorser	15/07/2015	50%	4 - Negotiate
Air space ceramics	Christian Cano	BALTHERABKA	16/07/2015	40%	1 - Quality
test opp	Christian Cano	VALEO SISTEMAS AUTOMOTIVOS LTD.	17/07/2015	40%	3 - Industrial testing
Test111	Christian Cano	Pinto S.A.	17/07/2015	60%	2 - Negotiate
Qualification Rhodoline	Marina Macchia	BAKER CROPSCIENCE SRL	22/07/2015	50%	4 - Negotiate
new P&G-10 for Siemens China	Georgios Houdappi	Siemens China	22/07/2015	40%	1 - Quality
Qualification Rhodoline	Christian Cano	BAKER CROPSCIENCE SRL	23/07/2015	50%	4 - Negotiate
JDA	Stefano Meazza	TEST - CHNS Spa	28/07/2015	60%	2 - Negotiate
Huatai Motor CAC	Tony Song	LeGing YuCheng Electrical Co.Ltd	30/07/2015	60%	3 - Industrial testing
TEST OPPY CONFIDENTIAL for GLKVIEW	Anne Gilles	BAKER 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.

Report Type: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All | Add | Remove

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	Francis Coustry	map	2814.472.00	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 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	360.00	14/07/2015	60 %	2 - Negotiate
Qualif Rhodolite	Pierre-edouard Couderlier	Ruclre sensorier	400.00	15/07/2015	50 %	4 - Negotiate
Air space ceramics	Christian Cano	BALTEXRAMKA	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	LuQing YuCheng Electrical Co. Ltd	0.00	30/07/2015	60 %	3 - Industrial testing
TEST OPPY CONFIDENTIAL for OLKVIEW	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.

Report Types: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All Add

expected yearly
Drag and drop to add fields to the report
Opportunity Custom Info
Expected Yearly Revenues

Filters Add

Show All opportunities Opportunity Status Any Probability All

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

equals OK Cancel

Preview Tabular Format Show Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mip	Françoise Cousy	mip	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 CROSCIENCE 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 CROSCIENCE 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 CROSCIENCE	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.

Report Types: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All Add

expected yearly
Drag and drop to add fields to the report
Opportunity Custom Info
Expected Yearly Revenues

Filters Add

Show All opportunities Opportunity Status Any Probability All

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

equals OK Cancel

Preview Tabular Format Show Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mip	Françoise Cousy	mip	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 CROSCIENCE 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 CROSCIENCE 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 CROSCIENCE	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**.

Report Types: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All Add

expected yearly
Drag and drop to add fields to the report
Opportunity Custom Info
Expected Yearly Revenues

Filters Add

Show All opportunities Opportunity Status Any Probability All

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

equals OK Cancel

Preview Tabular Format Show Remove All Columns

Opportunity Name	Opportunity Owner	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
mip	Françoise Cousy	mip	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 CROSCIENCE 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 CROSCIENCE 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 CROSCIENCE	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.

Report Types: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All Add

expected yearly
Drag and drop to add fields to the report
Opportunity Custom Info
Expected Yearly Revenues

Filters Add

Show All opportunities Opportunity Status Any Probability All

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

equals OK Cancel

Preview Tabular Format Show Remove All Columns

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. / INX	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 mip opp	Marika Macchia	BAYER CROSCIENCE 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. / INX	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 CROSCIENCE SRL	350.000,00	30/05/2015	0 %	5 - Closed Lost
Test	Arnaud Deneveest	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

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

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 MBMW 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	Arnaud Denewet	Arnaud 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	Verdian Mihalic	Verdian Mihalic	1.000.000.00	27/05/2015	100 %	3 - Closed Won
Finaltest	Arnaud 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

•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

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

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	Account Name	Expected Yearly Revenues	Close Date	Probability (%)	Stage
Opportunity Owner: Achim Pfeiffer (1 Record)					
Drop a field here to create a grouping. Hide					
Tetradex ice Cubes	Puchta Antardica	9.868.95	22/05/2015	100 %	5 - Closed Won
Opportunity Owner: Alexandre Guimaraes (1 Record)					
WHEELS FOR PLANTER	MAISA PLANTIO DIRETO	2.000.00	20/04/2015	100 %	5 - Closed Won
Opportunity Owner: Arnaud Denewet (2 Records)					
New polymer for cables	BAVER 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
Opportunity Owner: Ashish Tiwari (1 Record)					
test123	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.	2.100.000.00	12/06/2015	0 %	3 - Closed Lost
qualification modoline (colline)	BAVER CROPSOENCE SRL	350.000.00	30/06/2015	0 %	5 - Closed Lost
Opportunity Owner: Eckart Torgge (1 Record)					
Marine for RFO Reader	Reader Electronic	80.000.00	29/05/2015	100 %	5 - Closed Won
Opportunity Owner: Fanny Missi (1 Record)					

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

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

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 MBMW Shampoo# Rhodoline	Marika Macchia	Test P MB	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	Arnaud 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	Verdian Mihalic	SAPONIA S.d.	1.000.000.00	27/05/2015	100 %	3 - Closed Won
Finaltest	Arnaud 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

- 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.

The screenshot shows the 'Unsaved Report' dialog box in SAP S/4HANA. The dialog is titled 'Save Report' and contains the following fields and options:

- Report Name:** A text input field.
- Report Unique Name:** A text input field with a help icon.
- Report Description:** A text input field.
- Report Folder:** A dropdown menu set to 'My Personal Custom Reports'.
- Save Hierarchy Level:** A checkbox.
- Buttons:** 'Save', 'Save and Run Report', and 'Cancel'.

The background shows a list of reports with columns for Name, Date, and Status. The reports listed include:

- Opportunity Owner: Achim Pfeiffer (1 Record)
- Opportunity Owner: Alexandre Guimarães (1 Record)
- Opportunity Owner: Amadul Demezel (2 Records)
- Opportunity Owner: Ashish Taneja (1 Record)
- Opportunity Owner: Cathine Van Vlaanderen (2 Records)
- Opportunity Owner: Caroline S.A. / R.V.
- Opportunity Owner: Edgar Herrgott (1 Record)
- Opportunity Owner: Fanny Miesli (1 Record)



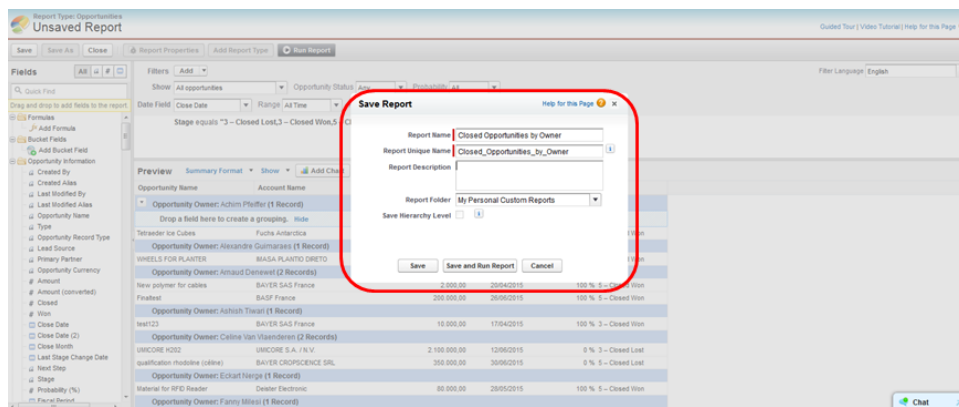
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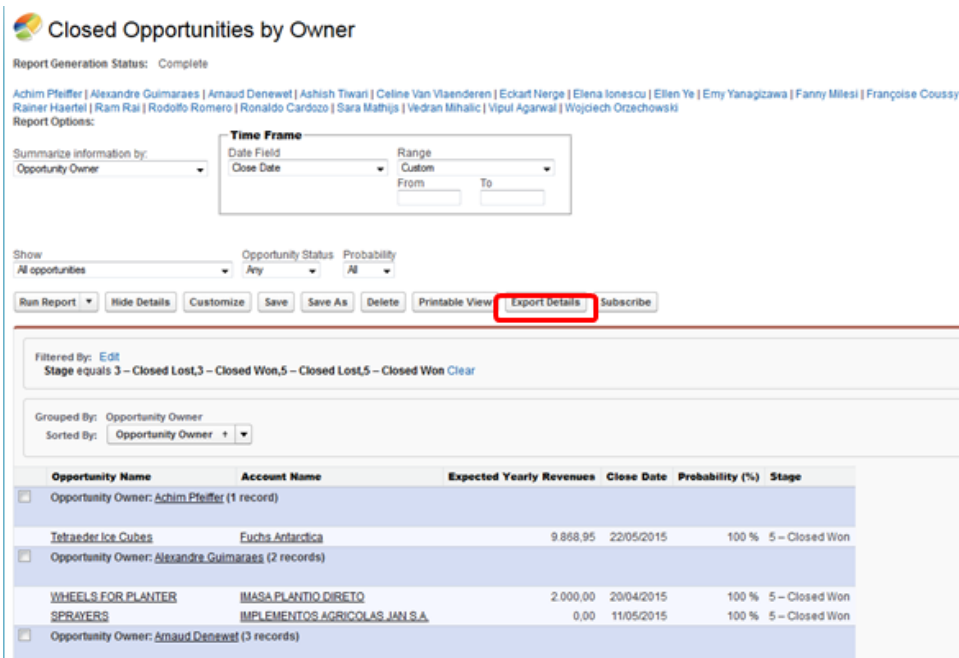
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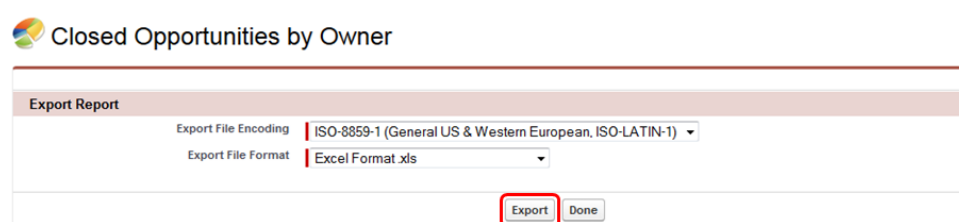
•David enters "Closed Opportunities by Owner" as the Report Name.
 •He chooses where the report should be saved. He selects the Report Folder "My Personal Custom Reports".
 •Then he clicks Save.



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.

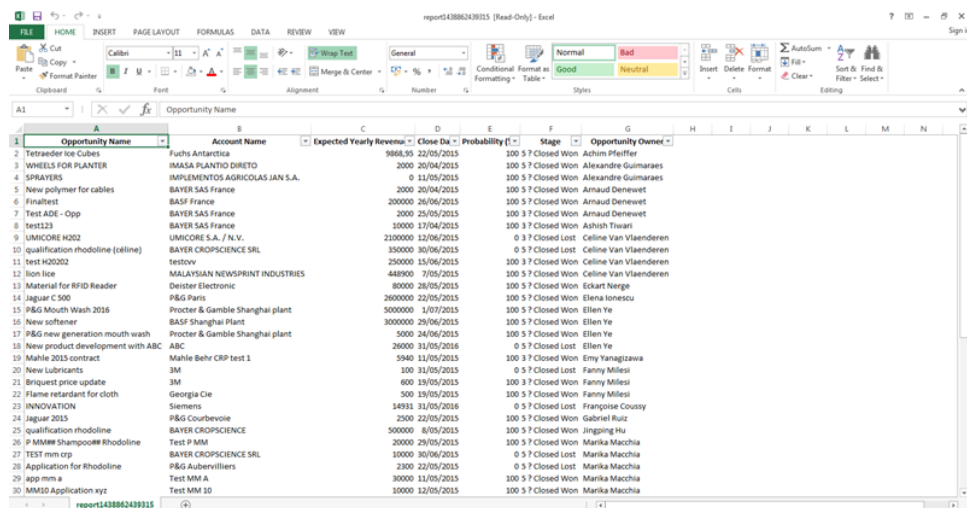


•He is transferred to a new window called Export Report.
 •He clicks on the Export button.



Viewing the Report in the excel file

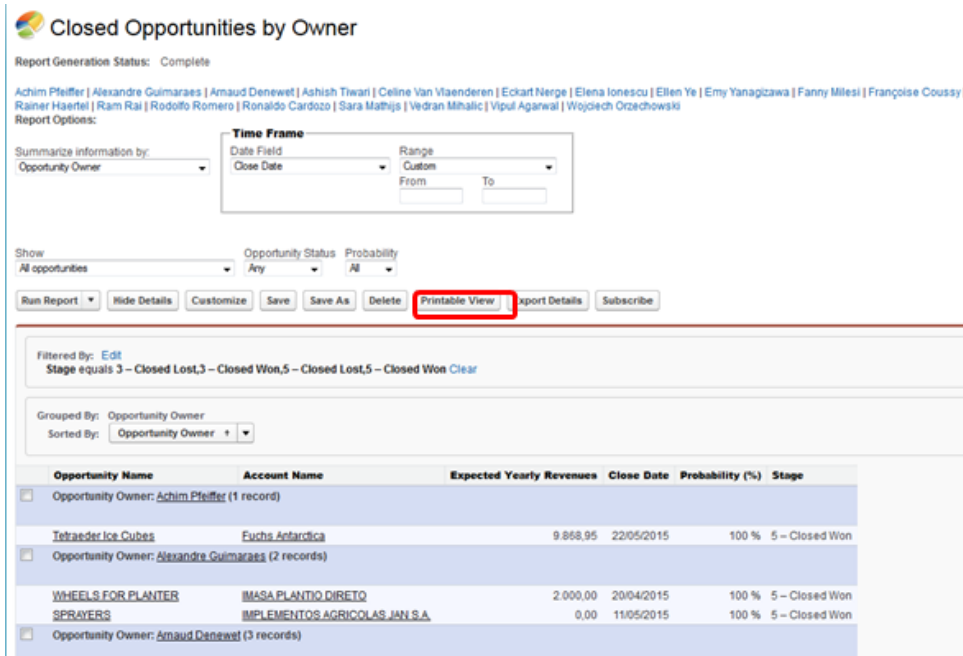
•He now has an excel file with all the data available from Salesforce.



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	MALAYSIAN 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	3000	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	10/05/2015	100 %	5 - Closed Won
Best price update	3M	600	10/05/2015	100 %	5 - Closed Won
Flame retardant for cloth	Georgia Cie	500	15/05/2015	100 %	5 - Closed Won
INNOVATION	Siemens	14931	31/05/2016	0 %	5 - Closed Lost
Jaguar 2015	P&G Courbevoie	2500	22/05/2015	100 %	5 - Closed Won
qualification rhodoline	BAYER CROSCIENCE	500000	8/05/2015	100 %	5 - Closed Won
P MMW Shampoo Rhodoline	Test P MM	20000	29/05/2015	100 %	5 - Closed Won
TEST mm crp	BAYER CROSCIENCE SRL	10000	30/06/2015	0 %	5 - Closed Lost
Application for Rhodoline	P&G Aubervilliers	2500	22/05/2015	0 %	5 - Closed Lost
app mm a	Test MM A	30000	11/05/2015	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.



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 Coussy | 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

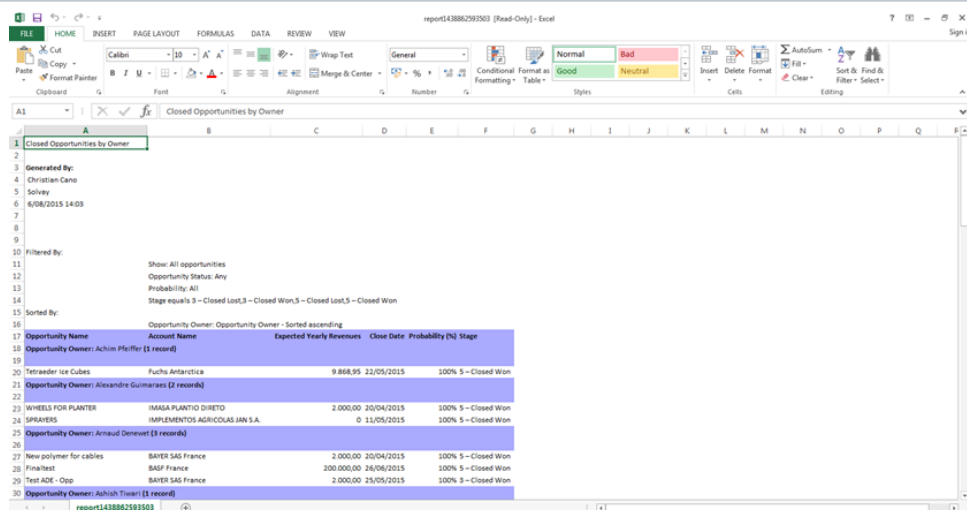
Filtered By: Edit, Stage equals 3 - Closed Lost, 3 - Closed Won, 5 - Closed Lost, 5 - Closed Won Clear

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/0008E000000Jl5X>

'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: [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.](#)

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/>

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

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