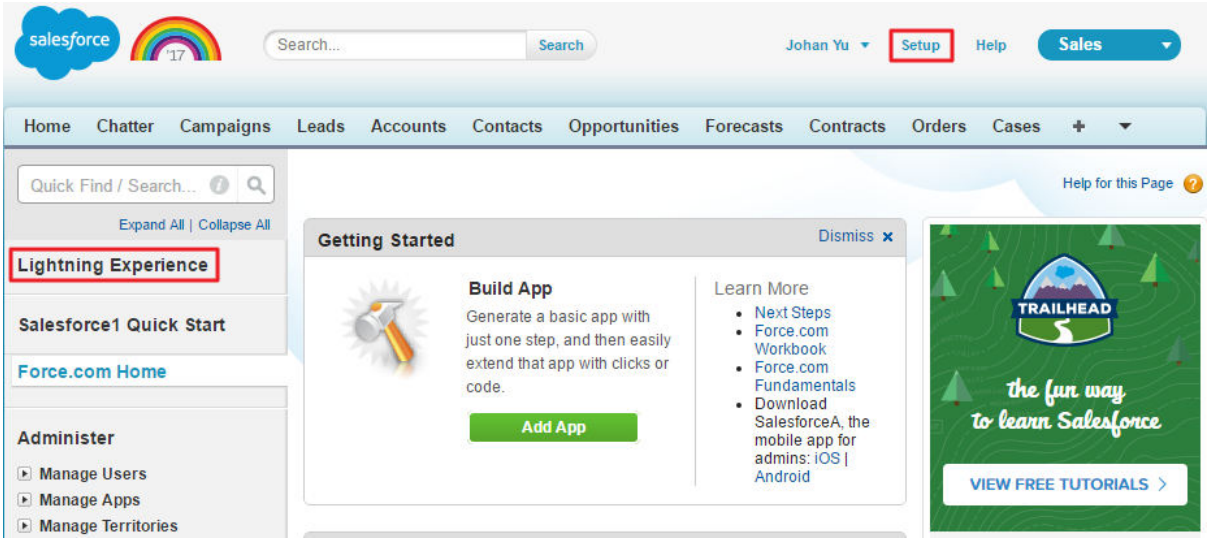
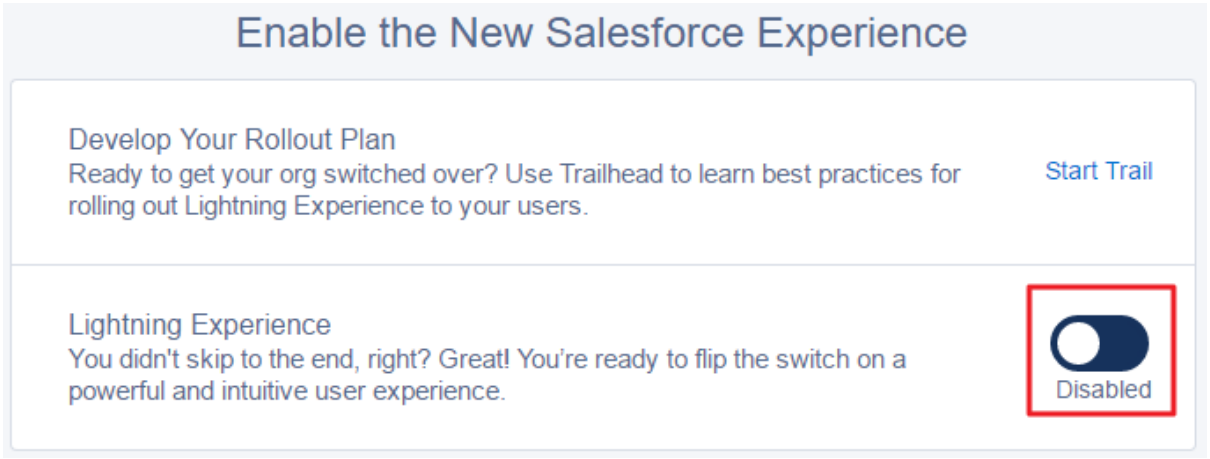
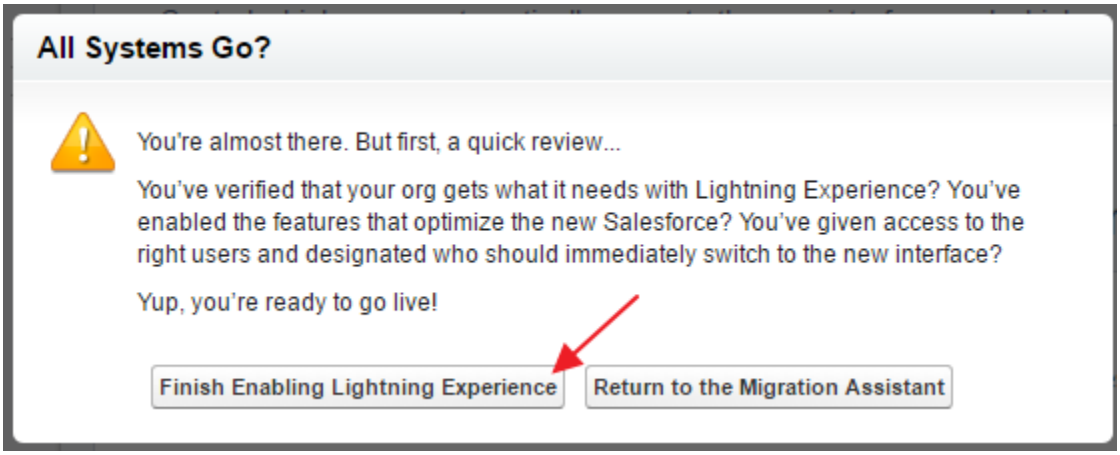
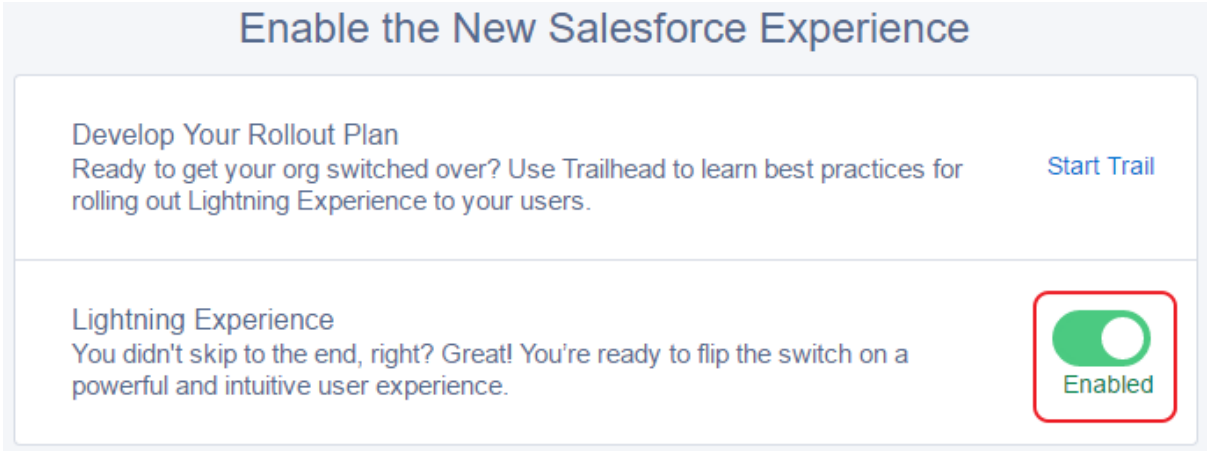
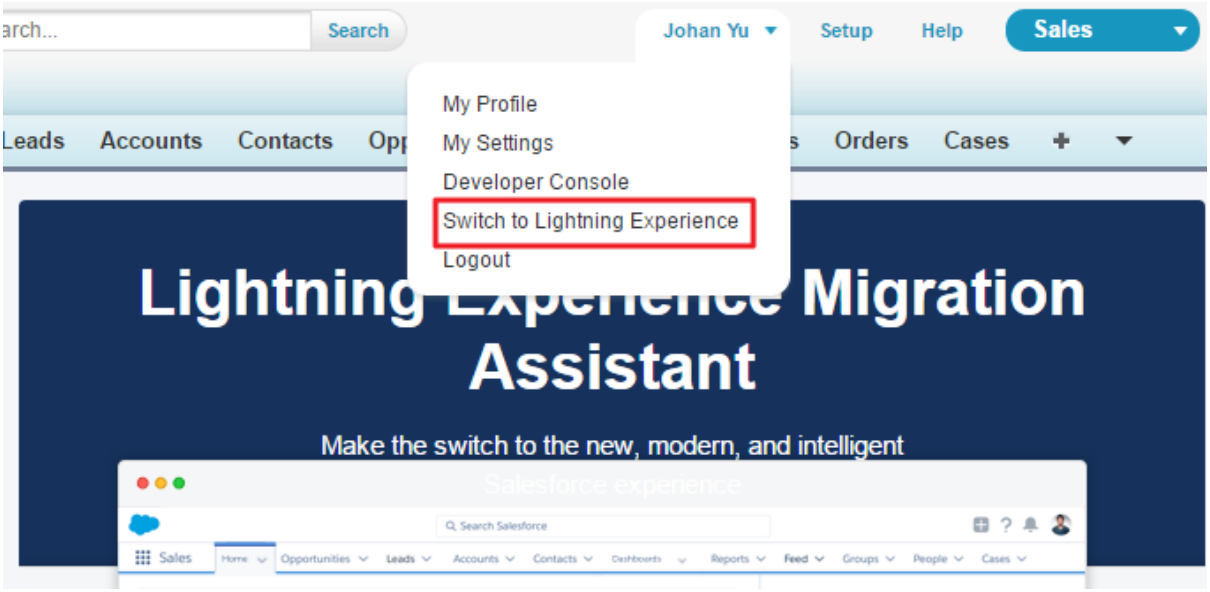
Chapter 1: Fundamentals of Salesforce Reports and Dashboards

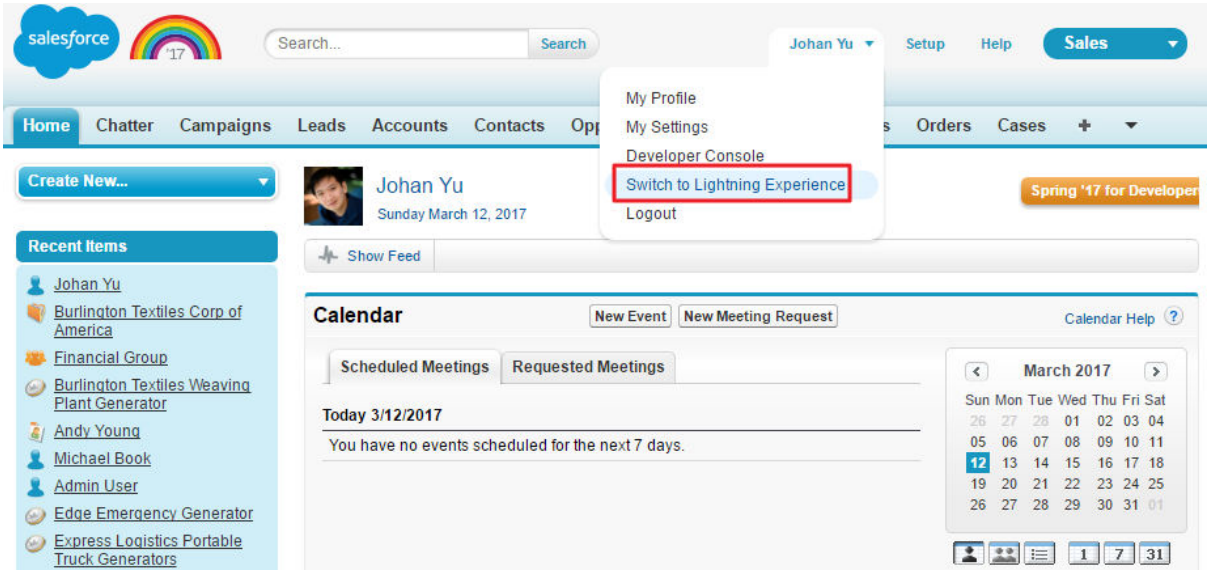


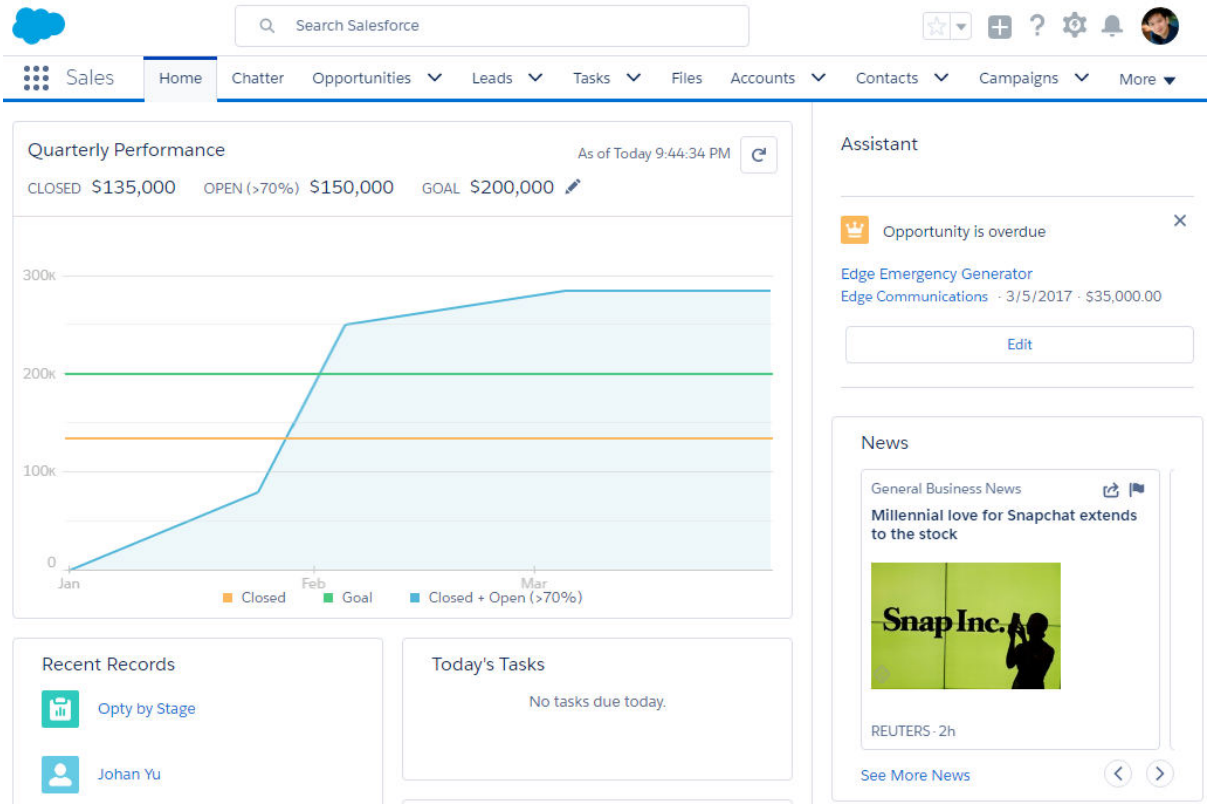


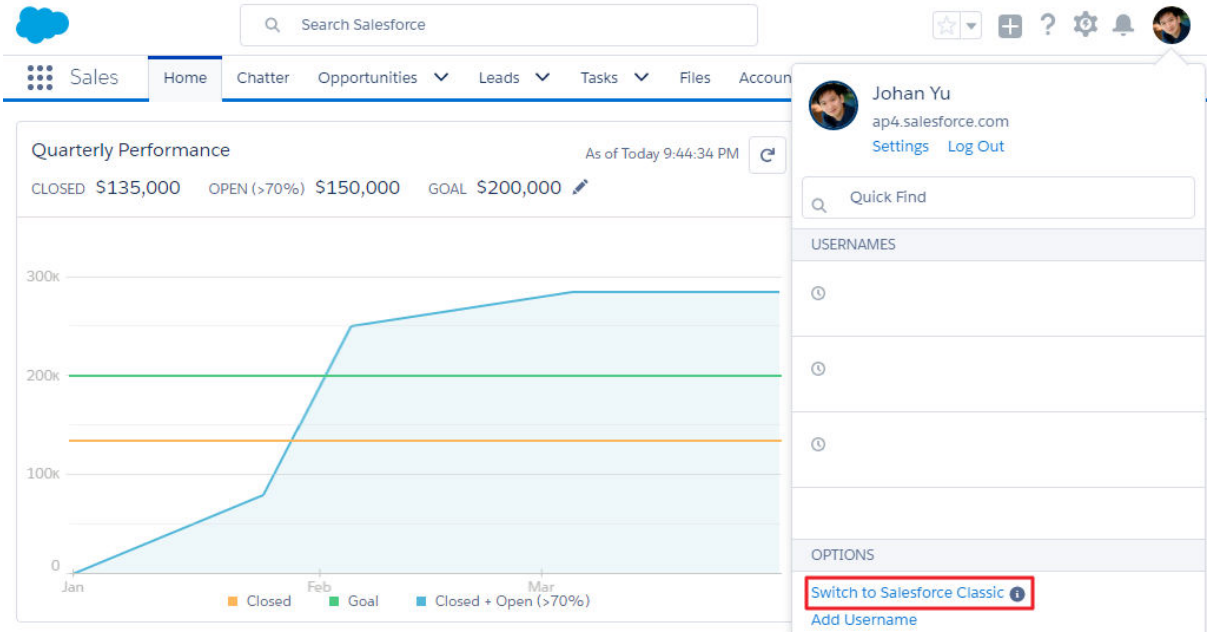

All Systems Go?
You're almost there. But first, a quick review...
You've verified that your org gets what it needs with Lightning Experience? You've enabled the features that optimize the new Salesforce? You've given access to the right users and designated who should immediately switch to the new interface?
Yup, you're ready to go live!
Finish Enabling Lightning Experience
Return to the Migration Assistant

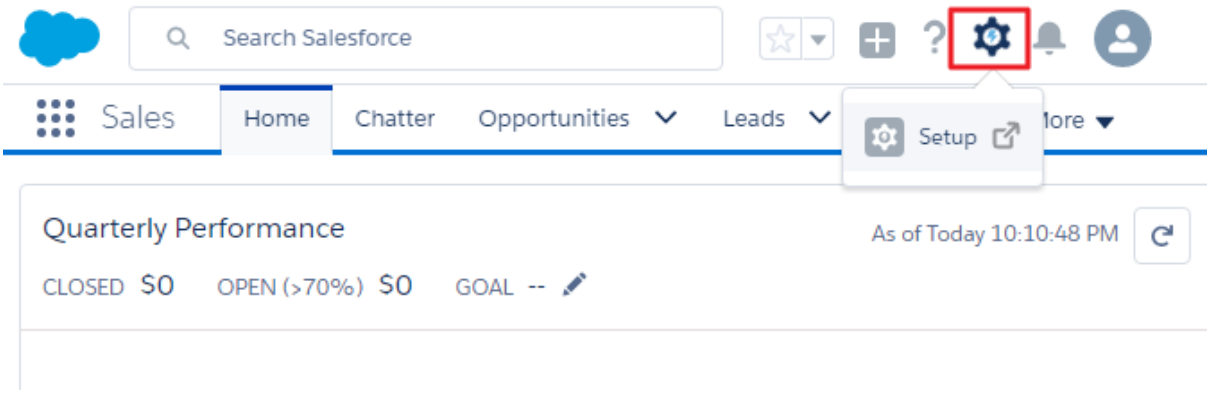

Enable the New Salesforce Experience
Develop Your Rollout Plan
Ready to get your org switched over? Use Trailhead to learn best practices for rolling out Lightning Experience to your users.
Start Trail
Lightning Experience
You didn't skip to the end, right? Great! You're ready to flip the switch on a powerful and intuitive user experience.
Enabled


Search
Johan Yu
Setup
Help
Sales
My Profile
My Settings
Developer Console
Switch to Lightning Experience
Logout
Leads
Accounts
Contacts
Orders
Cases
Migration
Assistant
Make the switch to the new, modern, and intelligent


salesforce
Search...
Search
Johan Yu
Setup
Help
Sales
My Profile
My Settings
Developer Console
Switch to Lightning Experience
Logout
Home
Chatter
Campaigns
Leads
Accounts
Contacts
Orders
Cases
Create New...
Recent Items
Johan Yu
Burlington Textiles Corp of America
Financial Group
Burlington Textiles Weaving Plant Generator
Andy Young
Michael Book
Admin User
Edge Emergency Generator
Express Logistics Portable Truck Generators
Johan Yu
Sunday March 12, 2017
Spring '17 for Developer
Show Feed
Calendar
New Event
New Meeting Request
Calendar Help
Scheduled Meetings
Requested Meetings
Today 3/12/2017
You have no events scheduled for the next 7 days.
March 2017
Sun Mon Tue Wed Thu Fri Sat


Search Salesforce
Sales
Home
Chatter
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
More
Quarterly Performance
As of Today 9:44:34 PM
CLOSED $135,000
OPEN (>70%) $150,000
GOAL $200,000
300K
200K
100K
0
Jan
Feb
Mar
Closed
Goal
Closed + Open (>70%)
Recent Records
Opty by Stage
Johan Yu
Today's Tasks
No tasks due today.
Assistant
Opportunity is overdue
Edge Emergency Generator
Edge Communications · 3/5/2017 · $35,000.00
Edit
News
General Business News
Millennial love for Snapchat extends to the stock
Snap Inc.
REUTERS · 2h
See More News


Search Salesforce
Sales
Home
Chatter
Opportunities
Leads
Tasks
Files
Quarterly Performance
As of Today 9:44:34 PM
CLOSED $135,000
OPEN (>70%) $150,000
GOAL $200,000
300K
200K
100K
0
Jan
Feb
Mar
Closed
Goal
Closed + Open (>70%)
Johan Yu
ap4.salesforce.com
Settings
Log Out
Quick Find
USERNAMES
OPTIONS
Switch to Salesforce Classic
Add Username


Search Salesforce
Sales
Home
Chatter
Opportunities
Leads
Setup
Quarterly Performance
As of Today 10:10:48 PM
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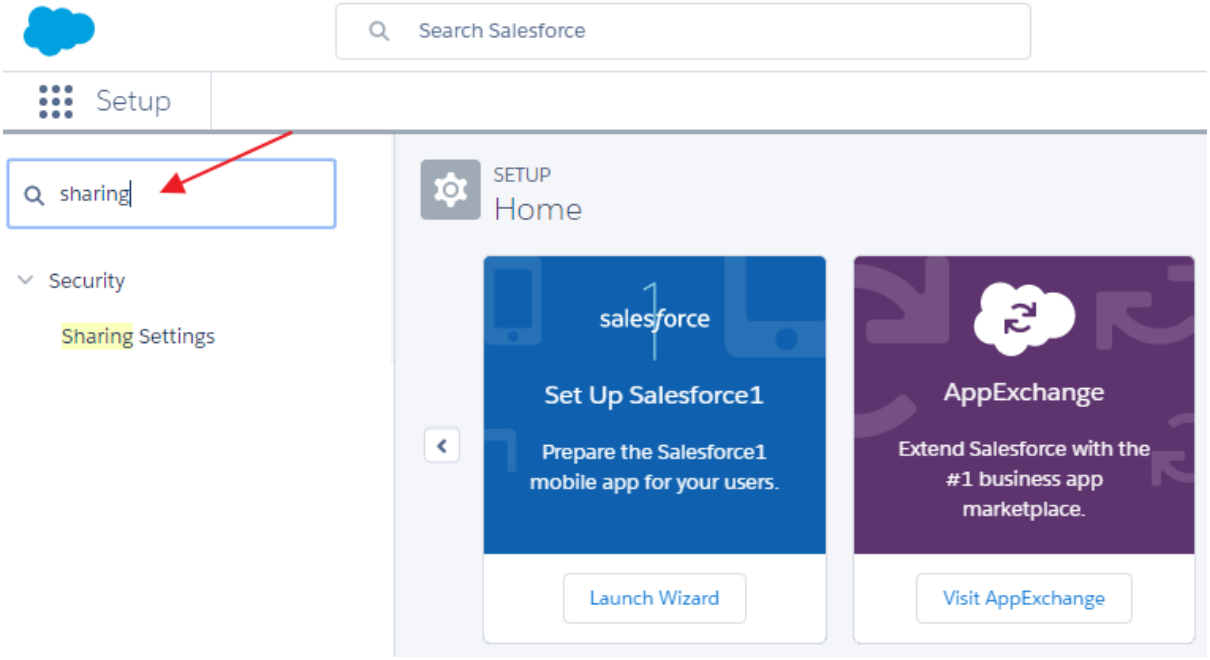
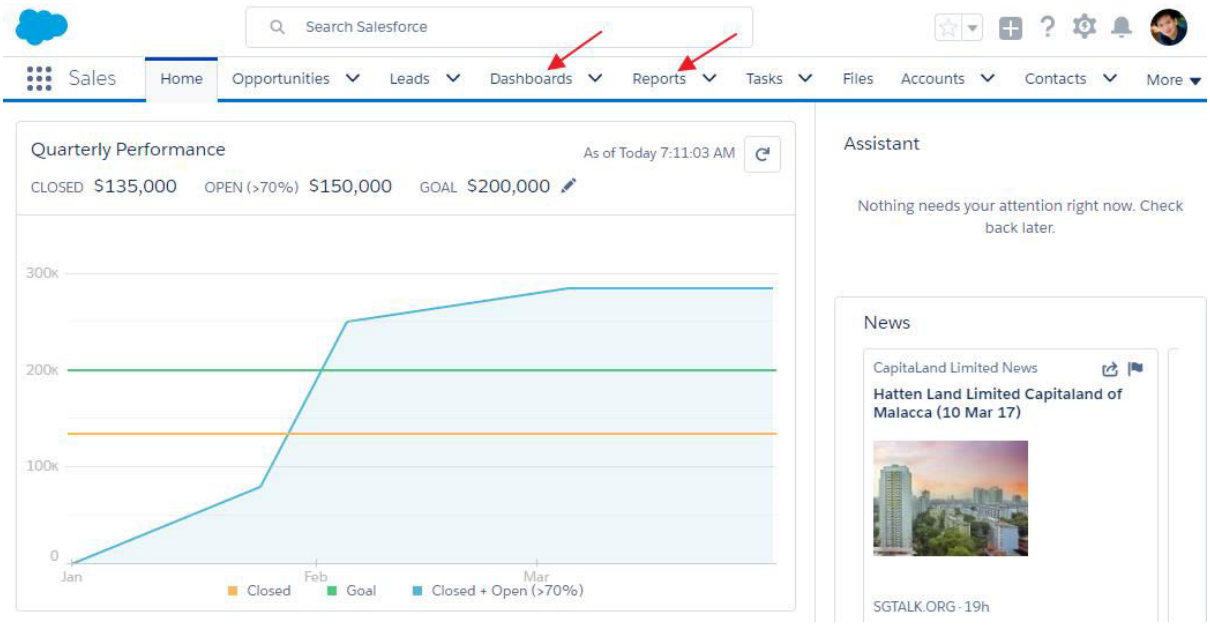
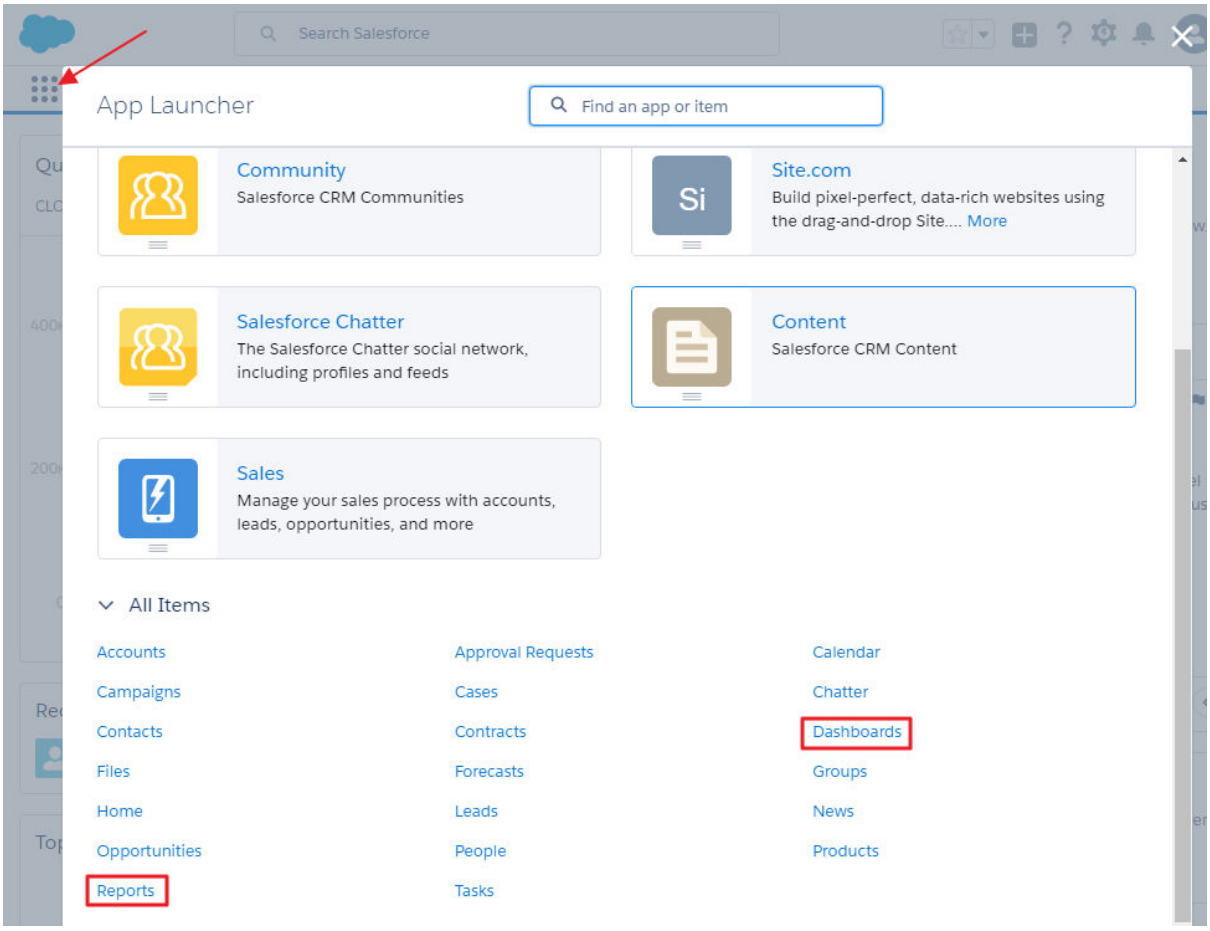
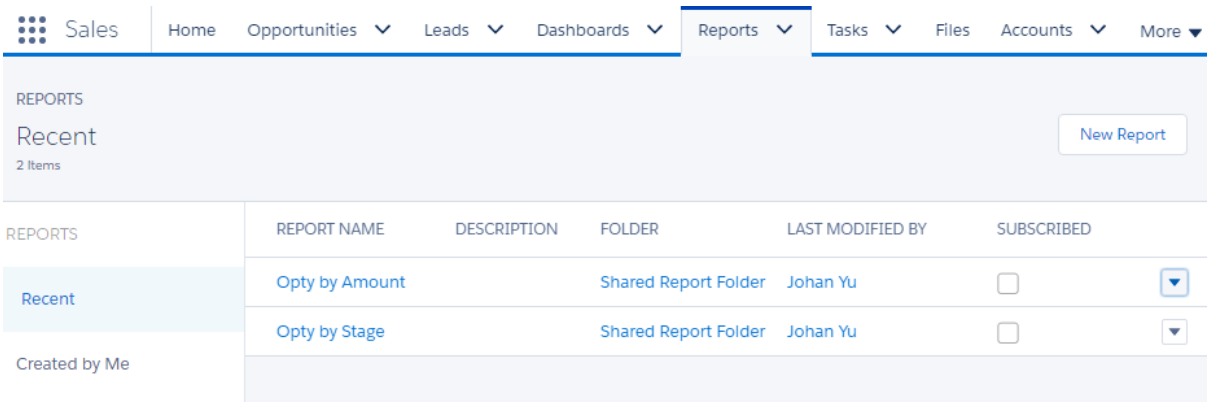
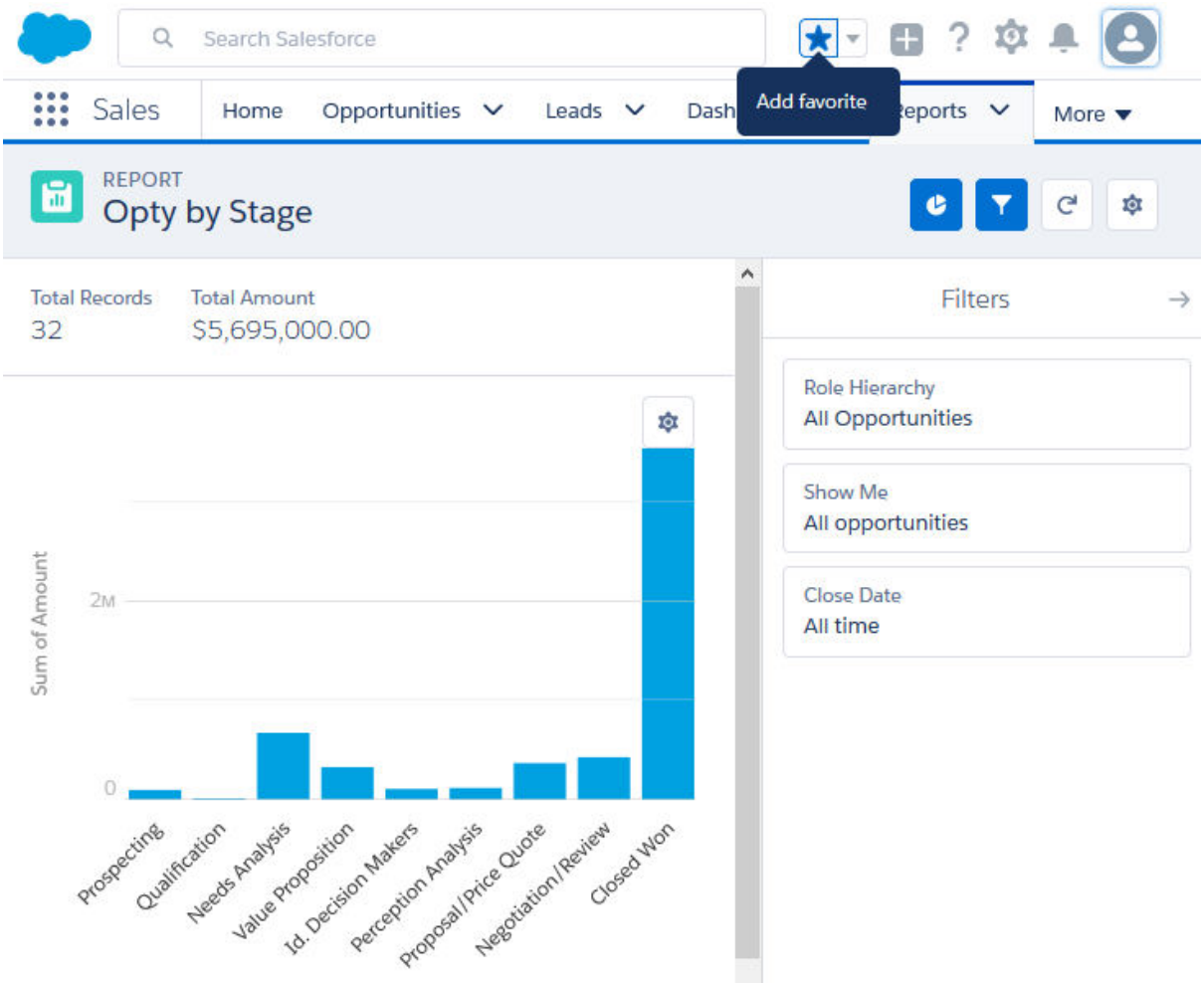
OPEN (>70%) $0
GOAL --

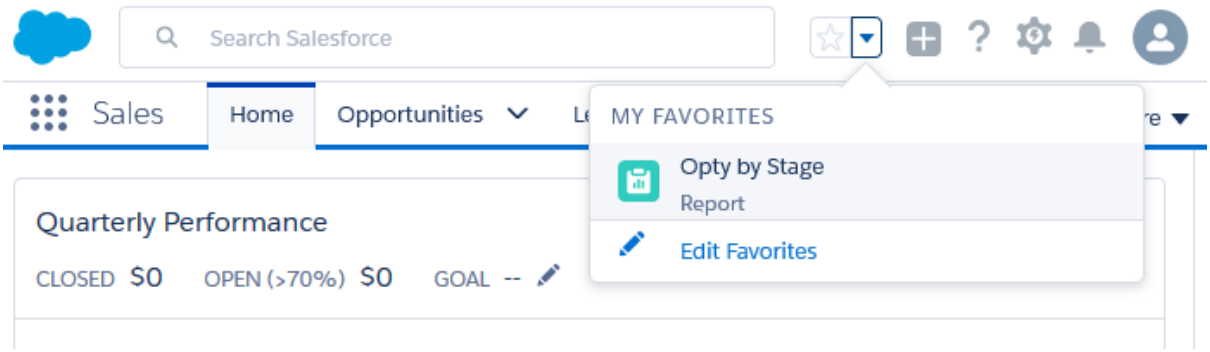

Search Salesforce
Setup
sharing
Security
Sharing Settings
SETUP
Home
salesforce
Set Up Salesforce1
Prepare the Salesforce1 mobile app for your users.
Launch Wizard
AppExchange
Extend Salesforce with the #1 business app marketplace.
Visit AppExchange

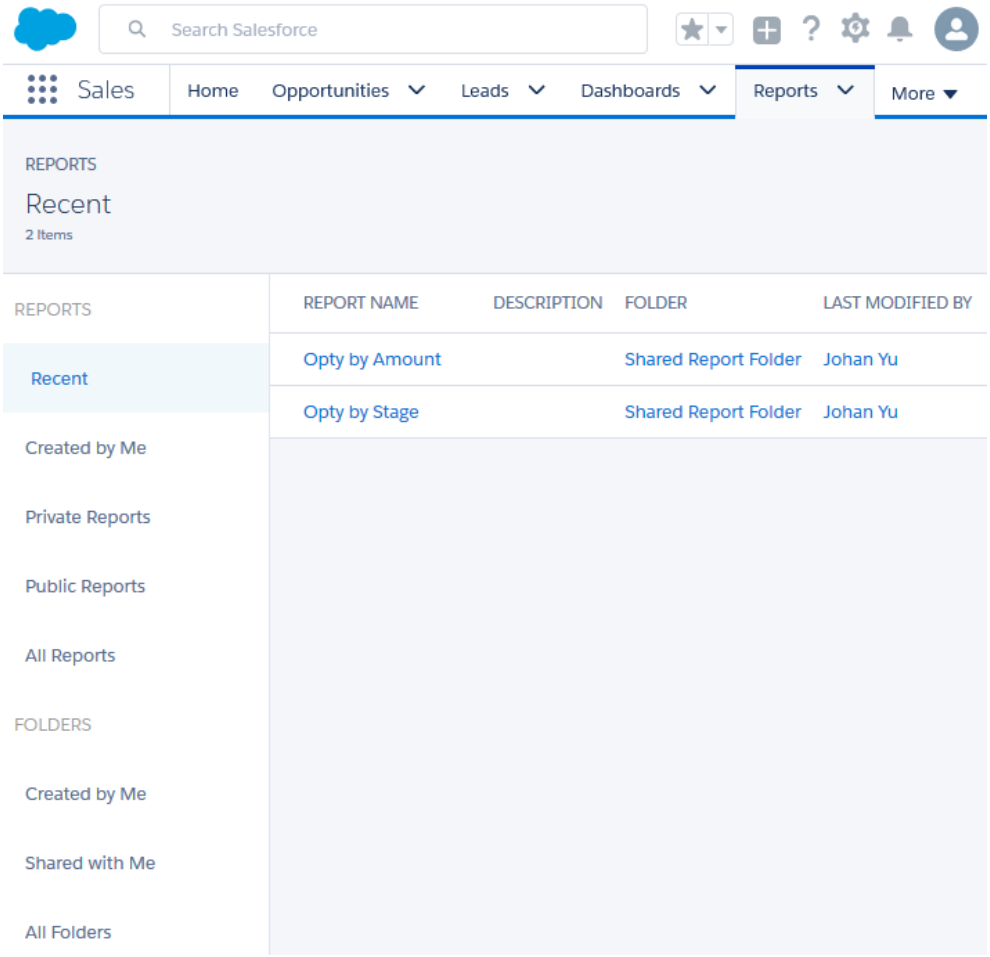

Search Salesforce
Sales
Home
Opportunities
Leads
Dashboards
Reports
Tasks
Files
Accounts
Contacts
More
Quarterly Performance
As of Today 7:11:03 AM
CLOSED $135,000
OPEN (>70%) $150,000
GOAL $200,000
300K
200K
100K
0
Jan
Feb
Mar
Closed
Goal
Closed + Open (>70%)
Assistant
Nothing needs your attention right now. Check back later.
News
CapitaLand Limited News
Hatten Land Limited Capitaland of Malacca (10 Mar 17)
SGTALK.ORG · 19h


Search Salesforce
App Launcher
Find an app or item
Community
Salesforce CRM Communities
Site.com
Build pixel-perfect, data-rich websites using the drag-and-drop Site.... More
Salesforce Chatter
The Salesforce Chatter social network, including profiles and feeds
Content
Salesforce CRM Content
Sales
Manage your sales process with accounts, leads, opportunities, and more
All Items
Accounts
Approval Requests
Calendar
Campaigns
Cases
Chatter
Contacts
Contracts
Dashboards
Files
Forecasts
Groups
Home
Leads
News
Opportunities
People
Products
Reports
Tasks

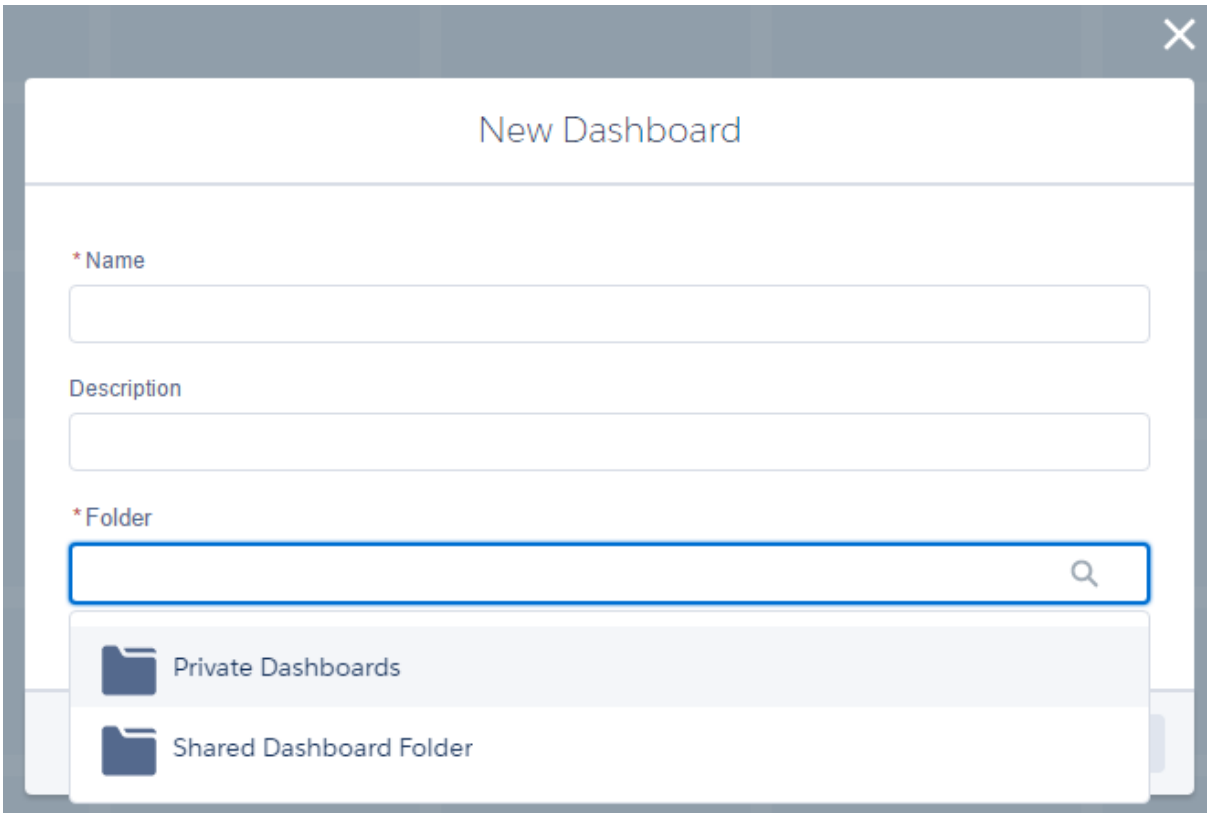

Sales
Home
Opportunities
Leads
Dashboards
Reports
Tasks
Files
Accounts
More
REPORTS
Recent
2 Items
New Report
REPORTS
Recent
Created by Me
REPORT NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
SUBSCRIBED
Opty by Amount
Shared Report Folder
Johan Yu
Opty by Stage
Shared Report Folder
Johan Yu

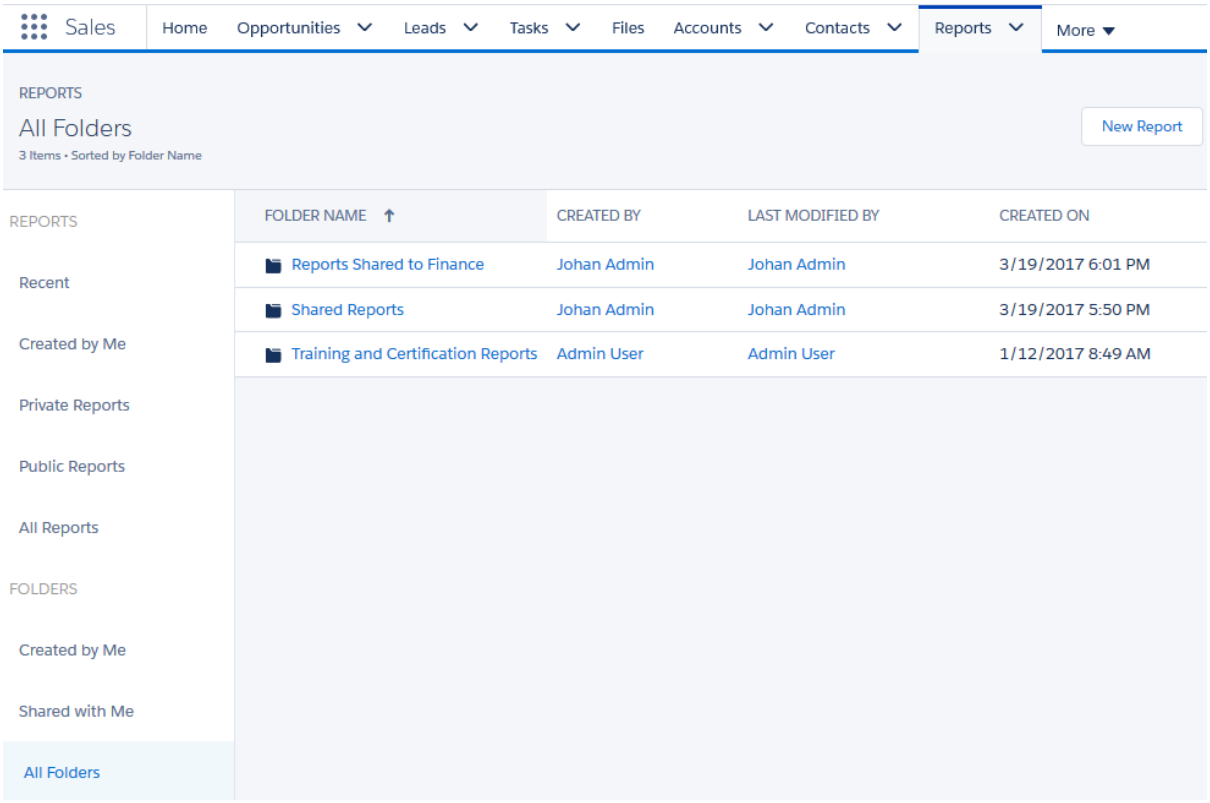

Search Salesforce
Add favorite
Sales
Home
Opportunities
Leads
Dash
eports
More
REPORT
Opty by Stage
Total Records
32
Total Amount
$5,695,000.00
Filters
Role Hierarchy
All Opportunities
Show Me
All opportunities
Close Date
All time
Sum of Amount
2M
0
Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Quote
Negotiation/Review
Closed Won

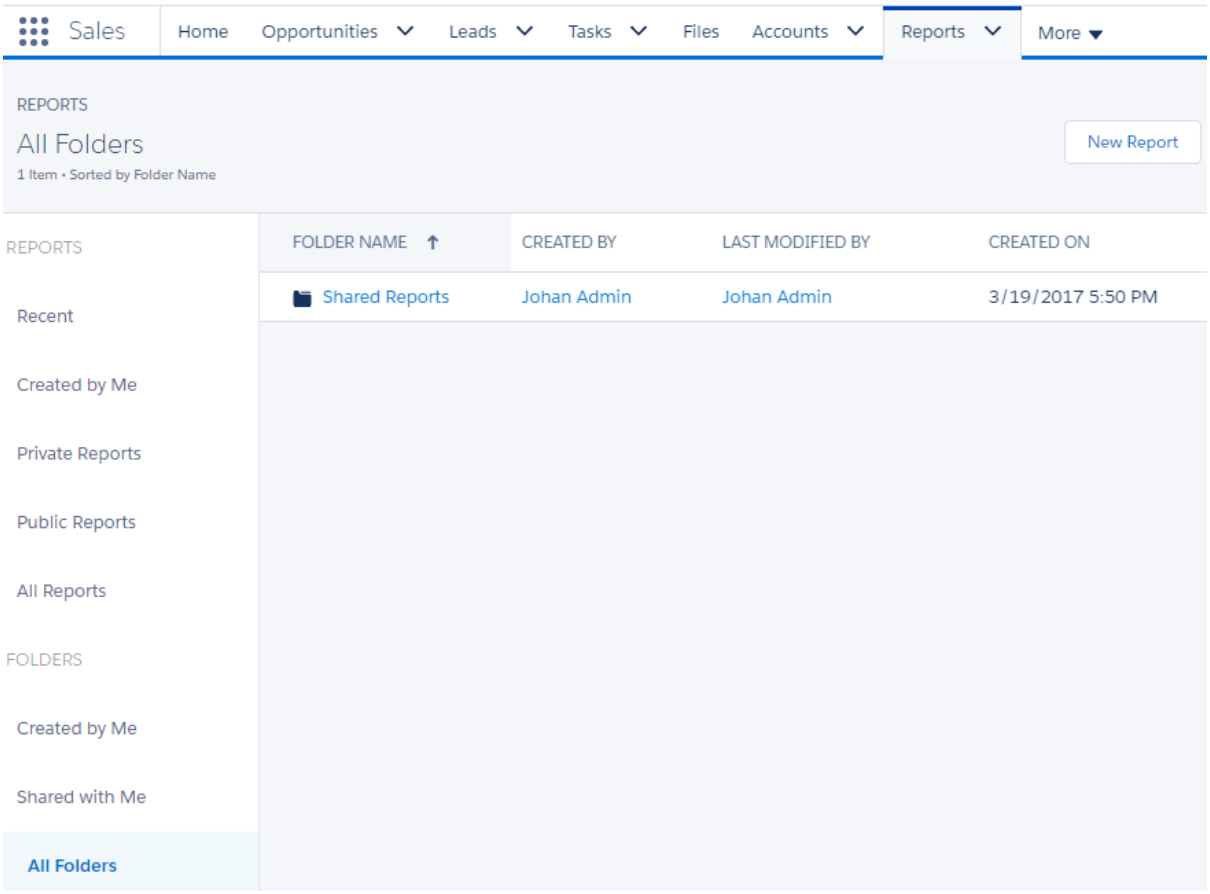

Search Salesforce
Sales
Home
Opportunities
MY FAVORITES
Opty by Stage
Report
Edit Favorites
Quarterly Performance
CLOSED $0
OPEN (>70%) $0
GOAL --

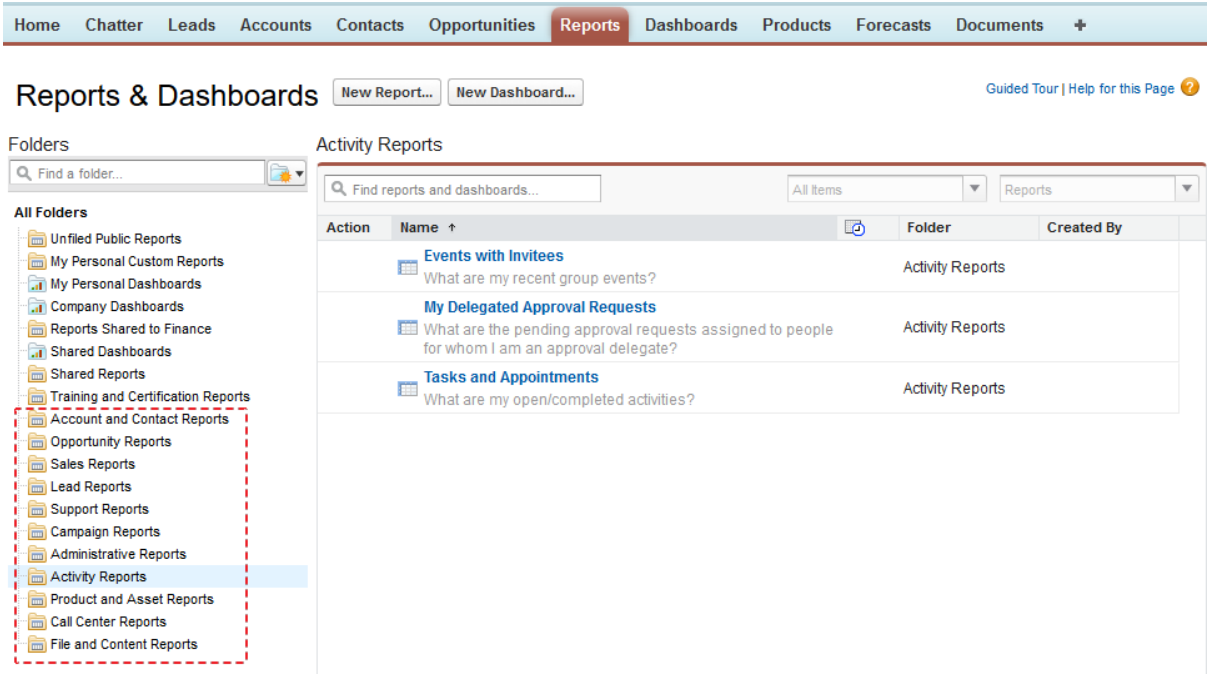

Search Salesforce
Sales
Home
Opportunities
Leads
Dashboards
Reports
More
REPORTS
Recent
2 Items
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
REPORT NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
Opty by Amount
Shared Report Folder
Johan Yu
Opty by Stage
Shared Report Folder
Johan Yu

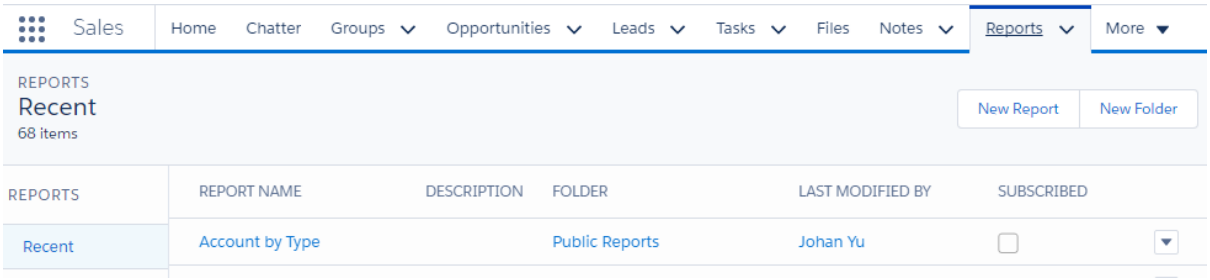
Chapter 2: Concepts and Permissions in Reports and Dashboards

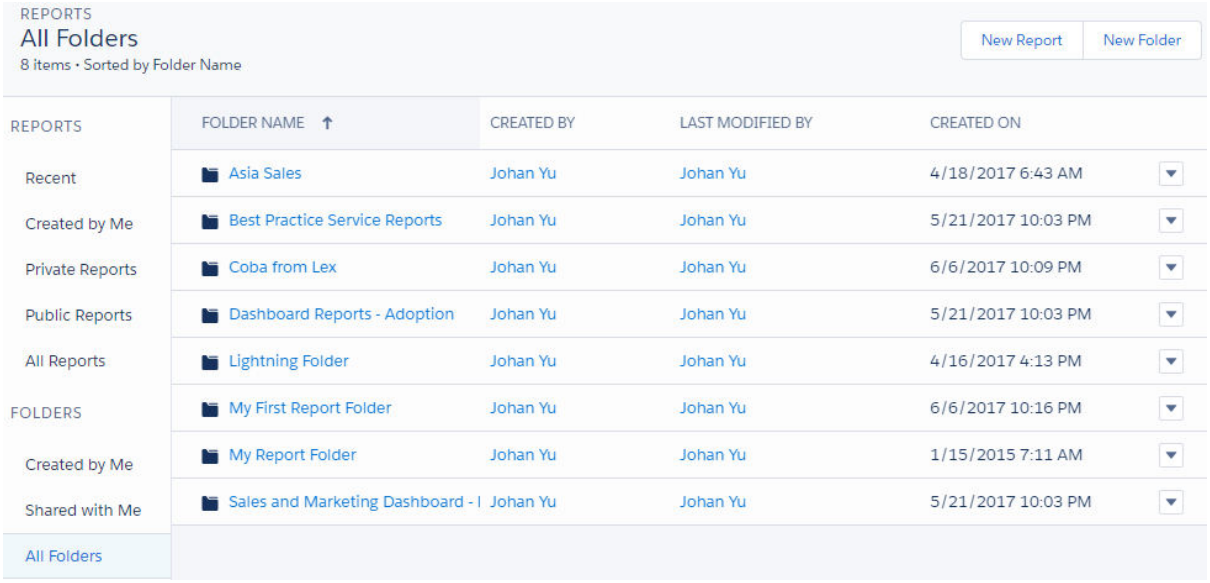


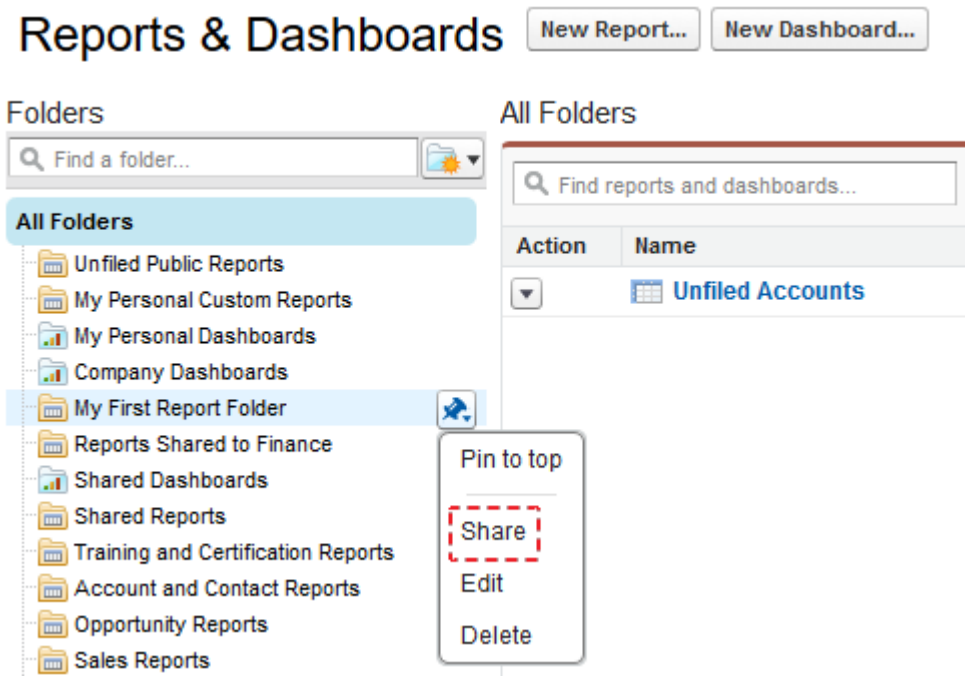

Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Reports
More
REPORTS
All Folders
3 Items • Sorted by Folder Name
New Report
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
FOLDER NAME
CREATED BY
LAST MODIFIED BY
CREATED ON
Reports Shared to Finance
Johan Admin
Johan Admin
3/19/2017 6:01 PM
Shared Reports
Johan Admin
Johan Admin
3/19/2017 5:50 PM
Training and Certification Reports
Admin User
Admin User
1/12/2017 8:49 AM

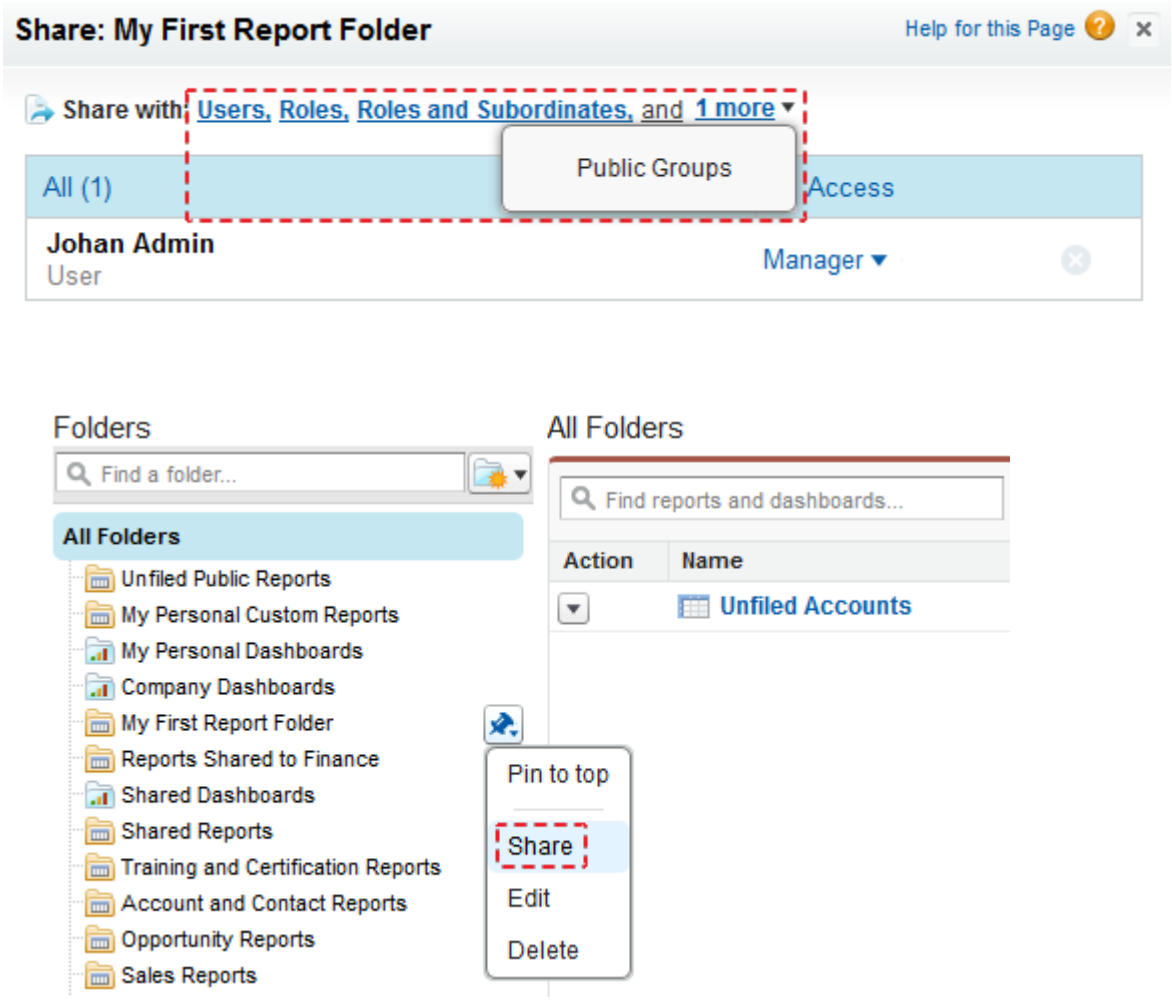

Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Reports
More
REPORTS
All Folders
1 Item • Sorted by Folder Name
New Report
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
FOLDER NAME
CREATED BY
LAST MODIFIED BY
CREATED ON
Shared Reports
Johan Admin
Johan Admin
3/19/2017 5:50 PM

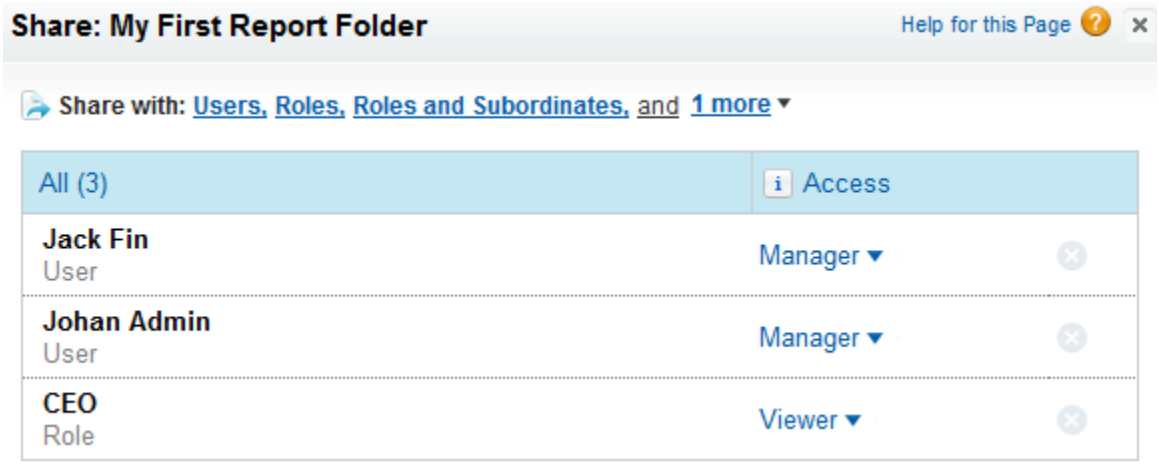

Home
Chatter
Leads
Accounts
Contacts
Opportunities
Reports
Dashboards
Products
Forecasts
Documents
Reports & Dashboards
New Report...
New Dashboard...
Guided Tour | Help for this Page
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Company Dashboards
Reports Shared to Finance
Shared Dashboards
Shared Reports
Training and Certification Reports
Account and Contact Reports
Opportunity Reports
Sales Reports
Lead Reports
Support Reports
Campaign Reports
Administrative Reports
Activity Reports
Product and Asset Reports
Call Center Reports
File and Content Reports
Activity Reports
Find reports and dashboards...
All Items
Reports
Action
Name
Folder
Created By
Events with Invitees
What are my recent group events?
Activity Reports
My Delegated Approval Requests
What are the pending approval requests assigned to people for whom I am an approval delegate?
Activity Reports
Tasks and Appointments
What are my open/completed activities?
Activity Reports

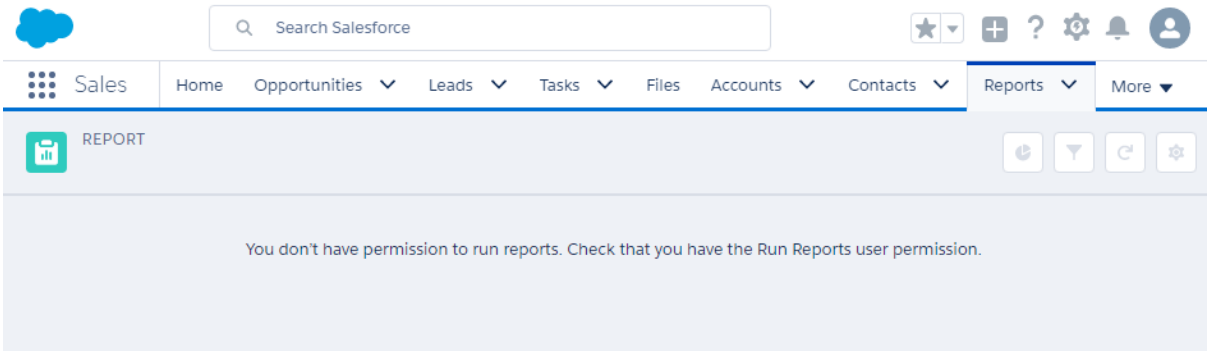

Sales
Home
Chatter
Groups
Opportunities
Leads
Tasks
Files
Notes
Reports
More
REPORTS
Recent
68 items
New Report
New Folder
REPORTS
Recent
REPORT NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
SUBSCRIBED
Account by Type
Public Reports
Johan Yu

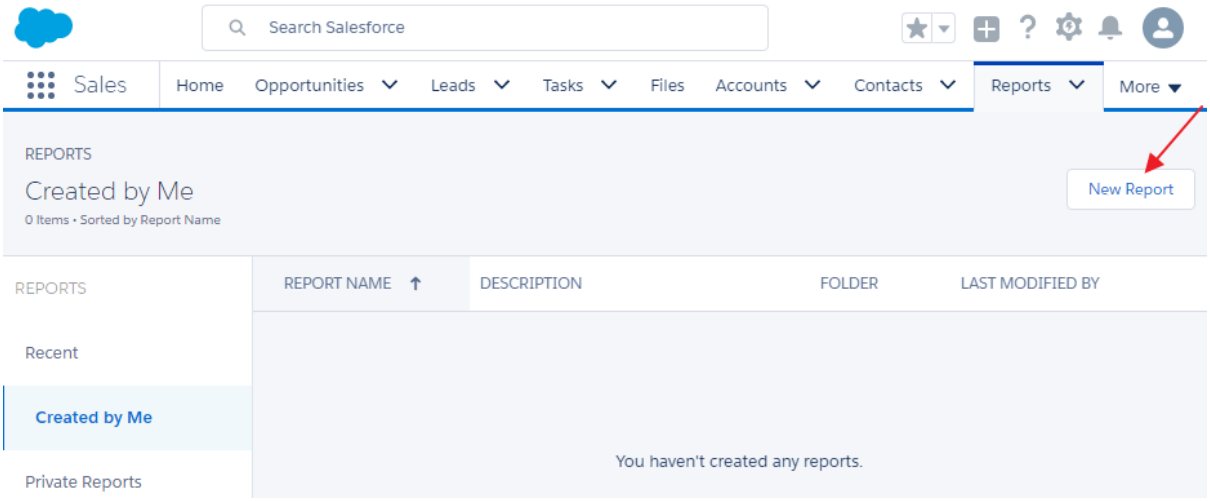

REPORTS
All Folders
8 items • Sorted by Folder Name
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
FOLDER NAME
CREATED BY
LAST MODIFIED BY
CREATED ON
Asia Sales Johan Yu Johan Yu 4/18/2017 6:43 AM
Best Practice Service Reports Johan Yu Johan Yu 5/21/2017 10:03 PM
Coba from Lex Johan Yu Johan Yu 6/6/2017 10:09 PM
Dashboard Reports - Adoption Johan Yu Johan Yu 5/21/2017 10:03 PM
Lightning Folder Johan Yu Johan Yu 4/16/2017 4:13 PM
My First Report Folder Johan Yu Johan Yu 6/6/2017 10:16 PM
My Report Folder Johan Yu Johan Yu 1/15/2015 7:11 AM
Sales and Marketing Dashboard - I Johan Yu Johan Yu 5/21/2017 10:03 PM

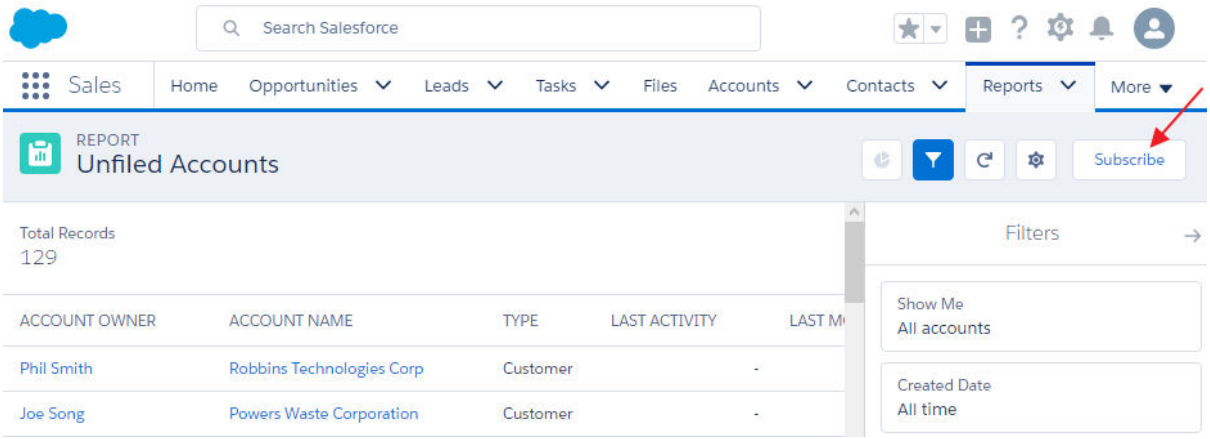

Reports & Dashboards
New Report...
New Dashboard...
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Company Dashboards
My First Report Folder
Reports Shared to Finance
Shared Dashboards
Shared Reports
Training and Certification Reports
Account and Contact Reports
Opportunity Reports
Sales Reports
Pin to top
Share
Edit
Delete
All Folders
Find reports and dashboards...
Action
Name
Unfiled Accounts

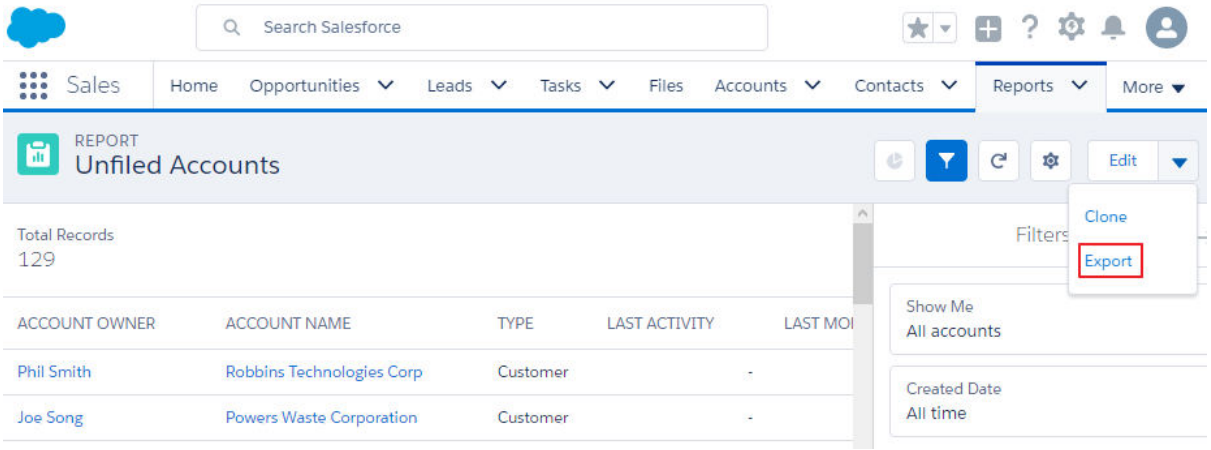

Share: My First Report Folder
Help for this Page
Share with: Users, Roles, Roles and Subordinates, and 1 more
Public Groups
All (1)
Access
Johan Admin
User
Manager
Folders
Find a folder...
All Folders
Unfiled Public Reports
My Personal Custom Reports
My Personal Dashboards
Company Dashboards
My First Report Folder
Reports Shared to Finance
Shared Dashboards
Shared Reports
Training and Certification Reports
Account and Contact Reports
Opportunity Reports
Sales Reports
Pin to top
Share
Edit
Delete
All Folders
Find reports and dashboards...
Action
Name
Unfiled Accounts

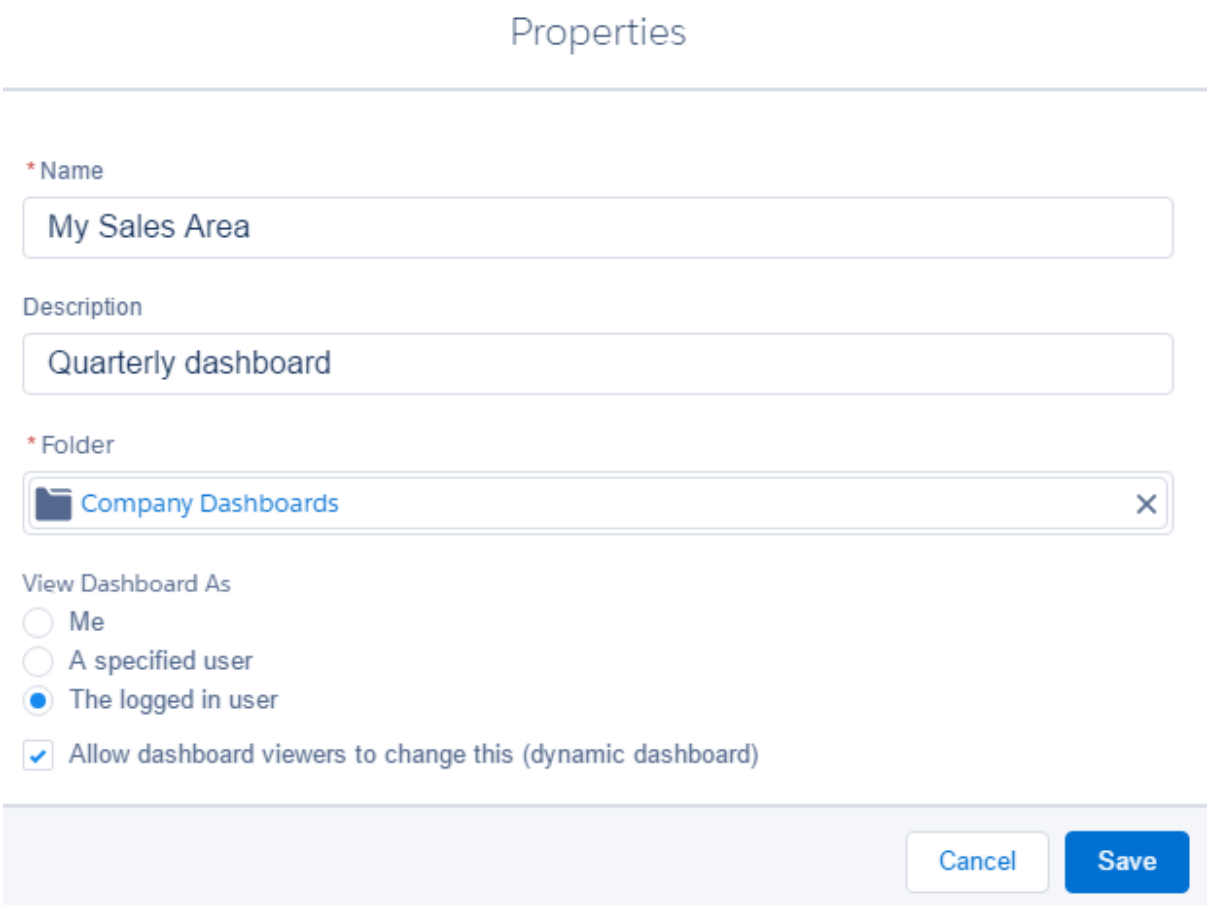

Share: My First Report Folder
Help for this Page
Share with: Users, Roles, Roles and Subordinates, and 1 more
All (3)
Access
Jack Fin
User
Manager
Johan Admin
User
Manager
CEO
Role
Viewer

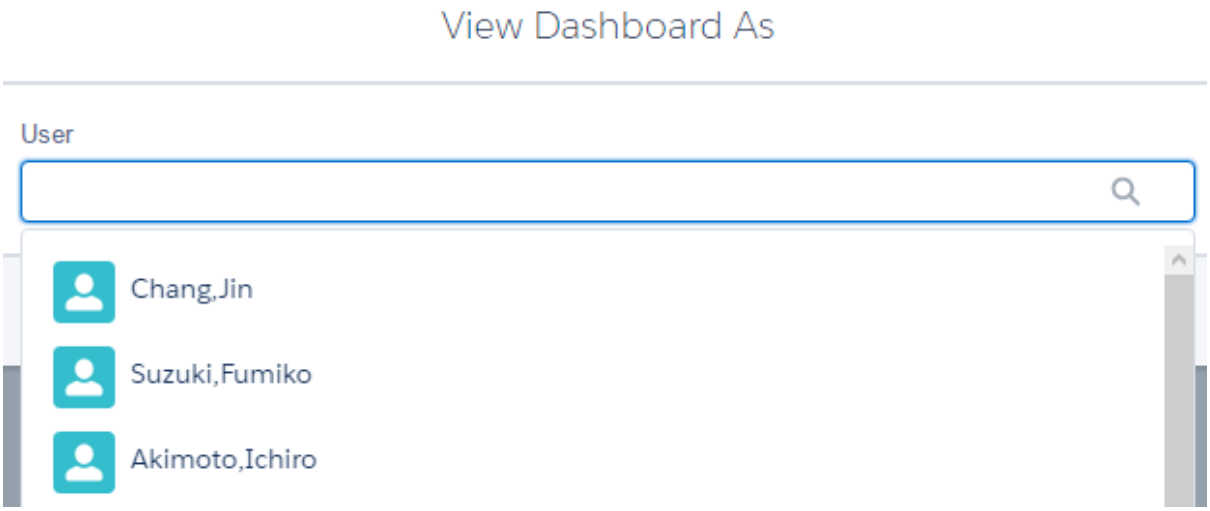

Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Reports
More
REPORT
You don't have permission to run reports. Check that you have the Run Reports user permission.


Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Reports
More
REPORTS
Created by Me
0 Items • Sorted by Report Name
New Report
REPORTS
Recent
Created by Me
Private Reports
REPORT NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
You haven't created any reports.

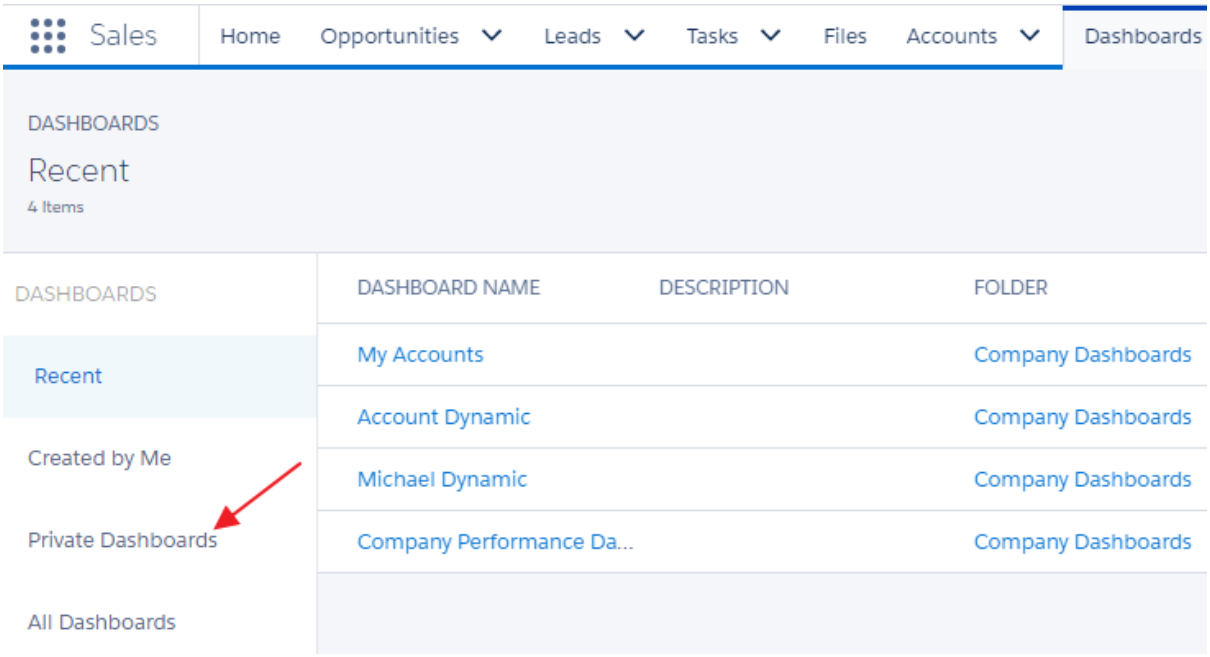

Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Reports
More
REPORT
Unfiled Accounts
Subscribe
Total Records
129
Filters
ACCOUNT OWNER
ACCOUNT NAME
TYPE
LAST ACTIVITY
Phil Smith
Robbins Technologies Corp
Customer
Joe Song
Powers Waste Corporation
Customer
Show Me
All accounts
Created Date
All time

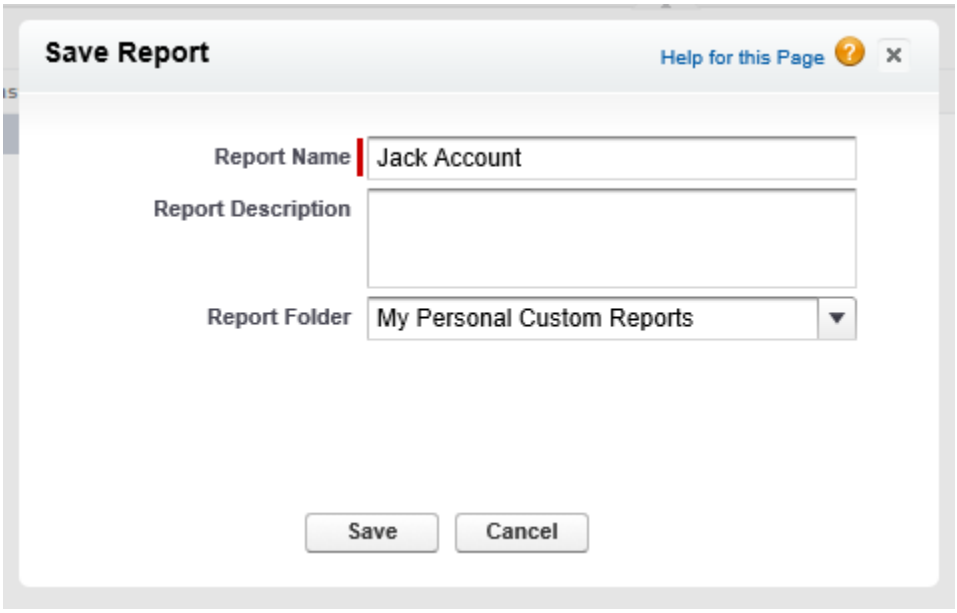

Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Reports
More
REPORT
Unfiled Accounts
Edit
Clone
Export
Total Records
129
Filters
ACCOUNT OWNER
ACCOUNT NAME
TYPE
LAST ACTIVITY
Phil Smith
Robbins Technologies Corp
Customer
Joe Song
Powers Waste Corporation
Customer
Show Me
All accounts
Created Date
All time


Properties
* Name
My Sales Area
Description
Quarterly dashboard
* Folder
Company Dashboards
View Dashboard As
Me
A specified user
The logged in user
Allow dashboard viewers to change this (dynamic dashboard)
Cancel
Save


View Dashboard As
User
Chang,Jin
Suzuki,Fumiko
Akimoto,Ichiro

Chapter 3: Implementing Security in Reports and Dashboards





REPORT
My Team's Pipeline Next Quarter

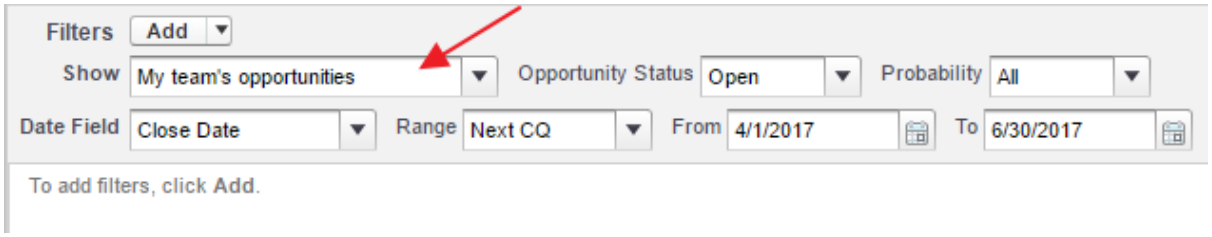
Total Records	Total Amount
3	USD 425,000.00

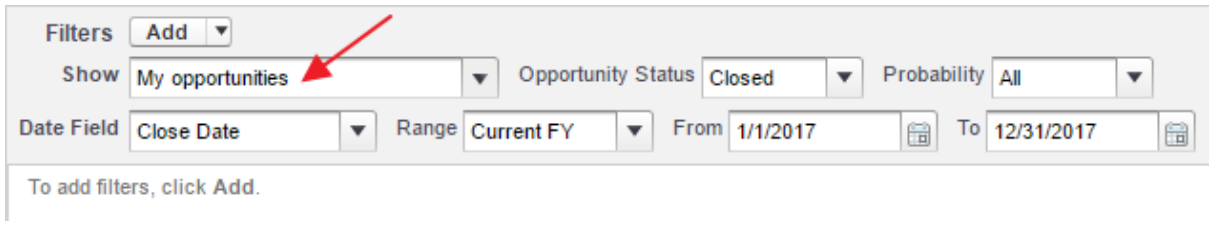
OPPORTUNITY OWNER	ACCOUNT NAME	OPPORTUNITY NAME	TYPE	STAGE	AMOUNT Sum	CLOSE DATE
Jack Fin (1 record)	DS Warehouse	DS Cityhall 8pk	New Business	Needs Analysis	USD 125,000.00	4/27/2017
					USD 125,000.00	
Michael Sal (2 records)	ABC Telecom	KIA Park 3PK	Existing Business	Needs Analysis	USD 50,000.00	4/30/2017
	ABC Telecom	ABC HQ 12PK	Existing Business	Qualification	USD 250,000.00	5/3/2017
					USD 300,000.00	

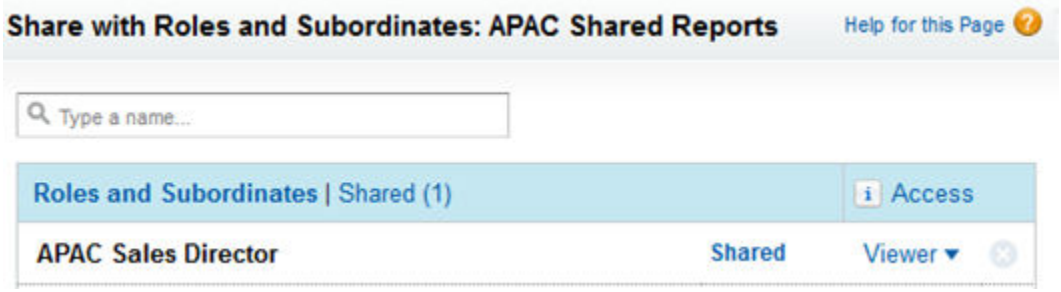
REPORT
My Team's Pipeline Next Quarter

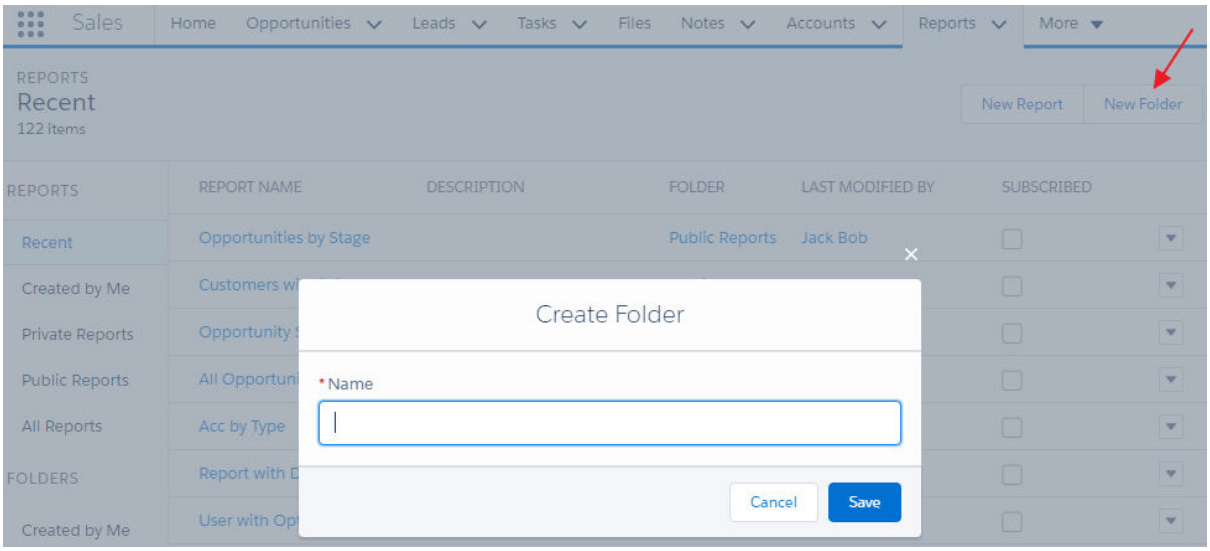
Total Records	Total Amount
1	USD 125,000.00

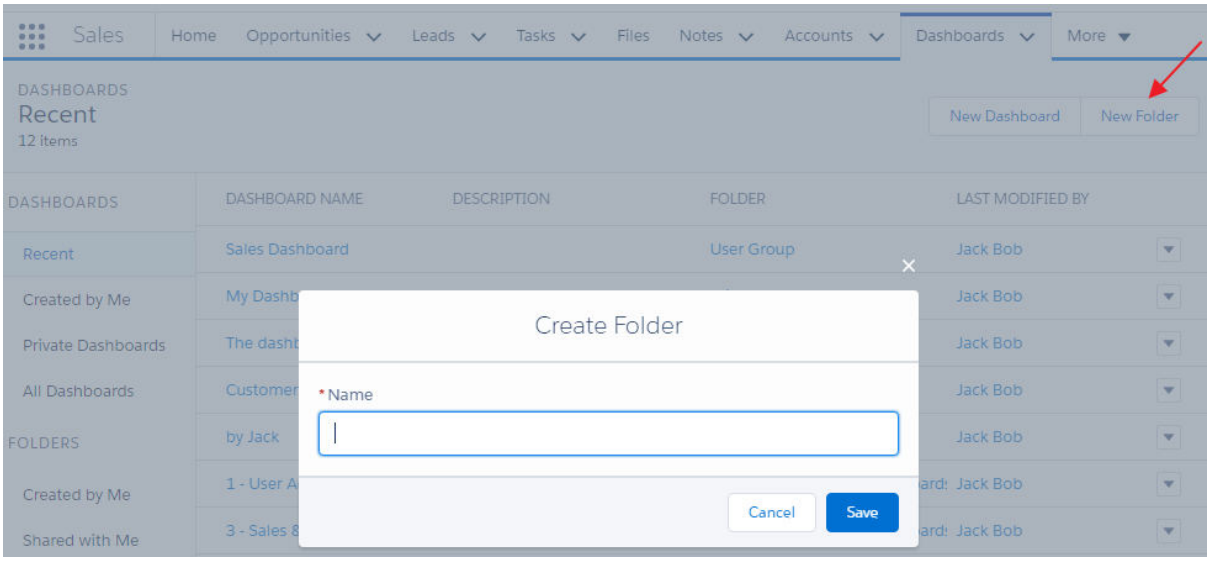
OPPORTUNITY OWNER	ACCOUNT NAME	OPPORTUNITY NAME	TYPE	STAGE	AMOUNT Sum	CLOSE DATE
Jack Fin (1 record)	DS Warehouse	DS Cityhall 8pk	New Business	Needs Analysis	USD 125,000.00	4/27/2017
					USD 125,000.00	

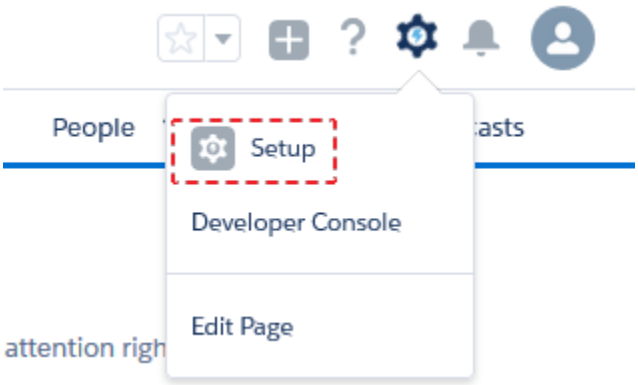


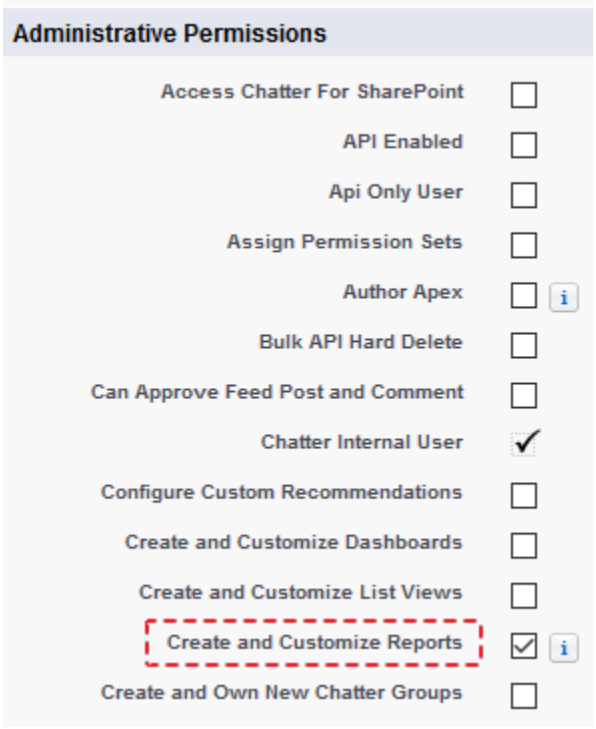



Share with Roles and Subordinates: APAC Shared Reports
Help for this Page
Type a name...
Roles and Subordinates | Shared (1)
Access
APAC Sales Director
Shared
Viewer


Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Reports
More
REPORTS
Recent
122 items
New Report
New Folder
REPORTS
REPORT NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
SUBSCRIBED
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Opportunities by Stage
Public Reports
Jack Bob
Acc by Type
Create Folder
*Name
Cancel
Save


Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Dashboards
More
DASHBOARDS
Recent
12 items
New Dashboard
New Folder
DASHBOARDS
DASHBOARD NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
Created by Me
Shared with Me
Sales Dashboard
User Group
Jack Bob
Create Folder
*Name
Cancel
Save


People
Setup
Developer Console
Edit Page
attention righ


Administrative Permissions
Access Chatter For SharePoint
API Enabled
Api Only User
Assign Permission Sets
Author Apex
Bulk API Hard Delete
Can Approve Feed Post and Comment
Chatter Internal User
Configure Custom Recommendations
Create and Customize Dashboards
Create and Customize List Views
Create and Customize Reports
Create and Own New Chatter Groups

Permission Set

Create

Help for this Page

Save | Cancel

Enter permission set information = Required Information

Label: Regional Admin

API Name: Regional_Admin

Description: Additional permissions for regional admin users

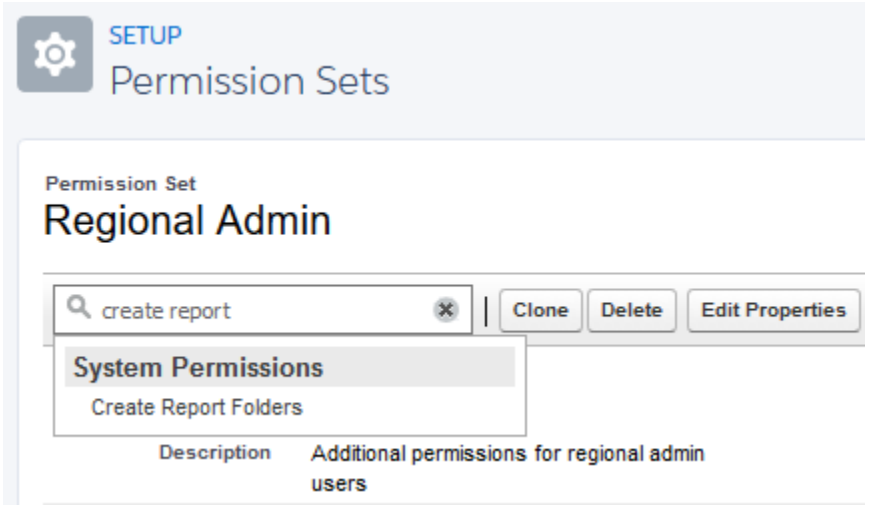
Select the type of users who will use this permission set

Who will use this permission set?

-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? Learn more here.

License: --None--



Create Dashboard Folders	☐ ⓘ	nage these folders if sharing rights allow.
Create Libraries	☐	
Create Report Folders	☑ ⓘ	Create report folders and manage these folders if sharing rights allow.
Create Topics	☐	Create new topics by assigning them to feed items.

Requires these permissions:

Create and Customize Reports

Assign Users

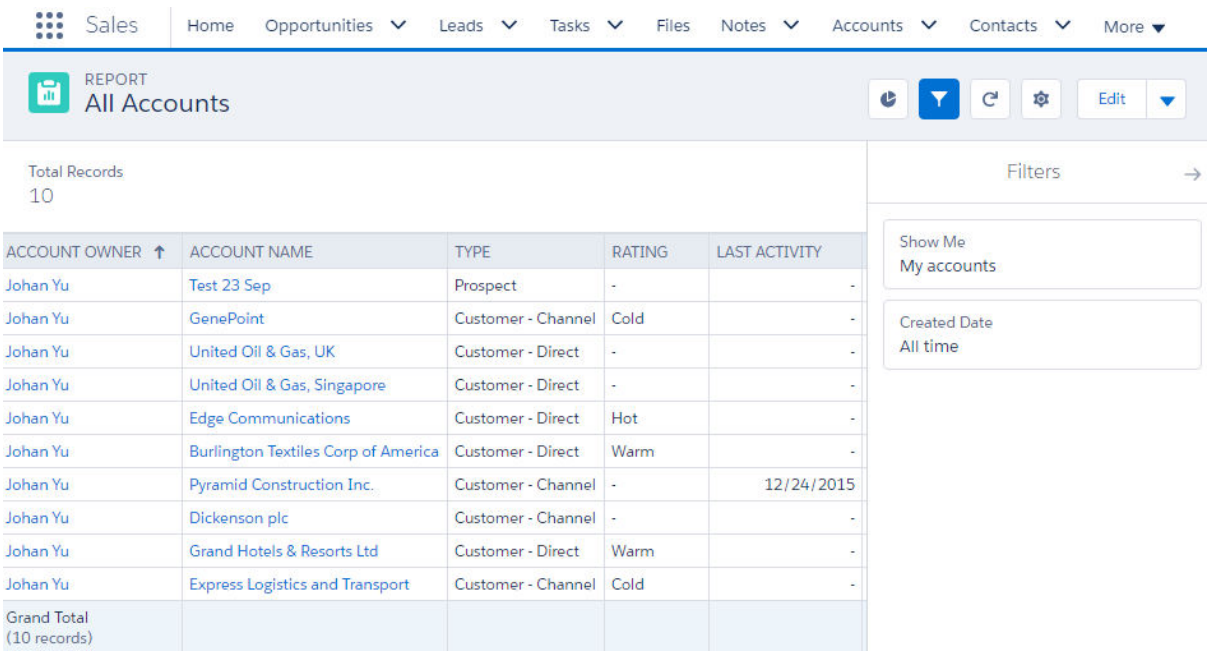
All Users

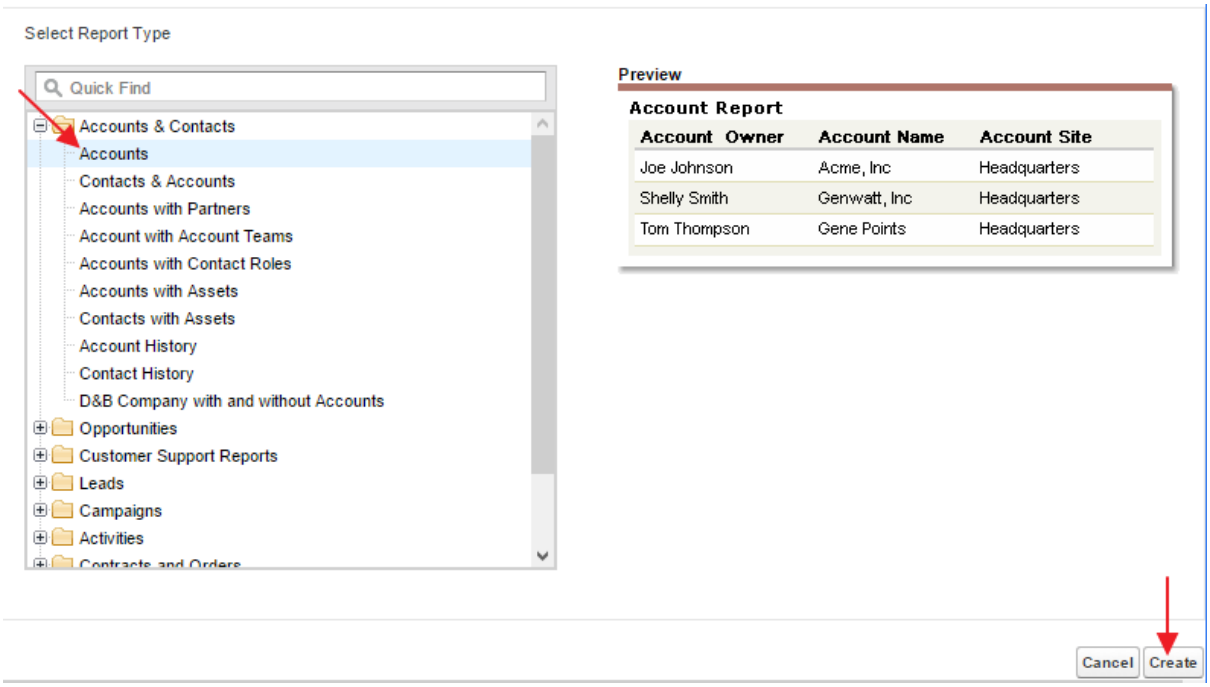
View: All Users Edit | Create New View

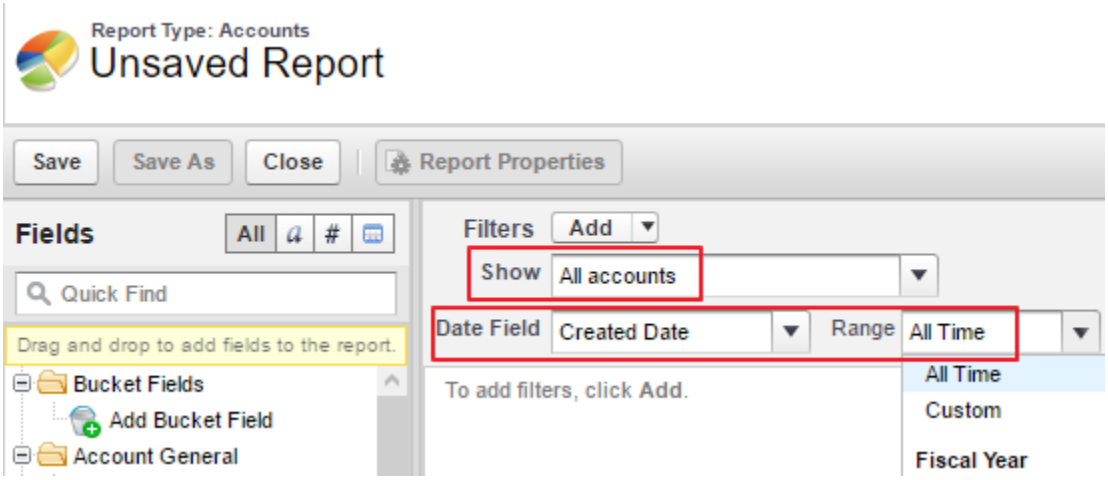
Assign Cancel

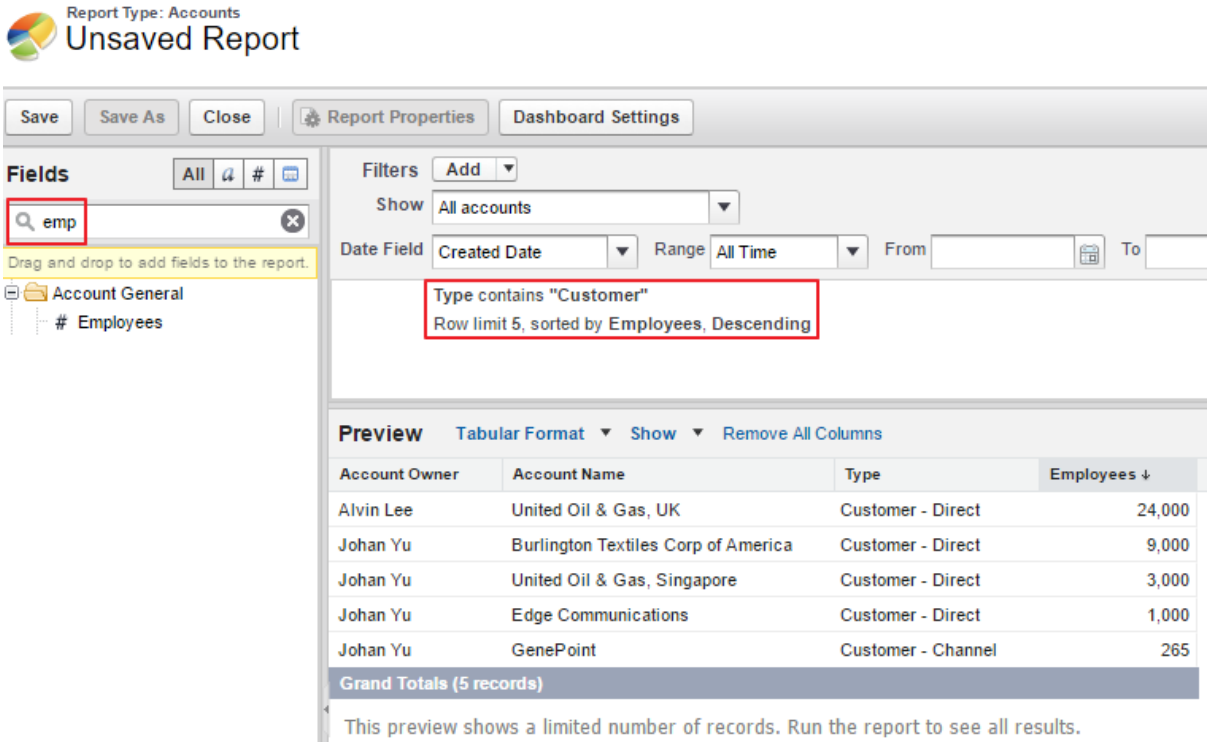
Action	Full Name	Alias	Username
☑ | Edit | Login	Sal, Michael	muser	[redacted]
☑ | Edit	Admin, Johan	AUser	[redacted]
☐ | Edit | Login	Fin, Jack	jfina	[redacted]

Chapter 4: Creating and Managing Reports




Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Accounts with Partners
Account with Account Teams
Accounts with Contact Roles
Accounts with Assets
Contacts with Assets
Account History
Contact History
D&B Company with and without Accounts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Preview
Account Report
Account Owner
Account Name
Account Site
Joe Johnson
Acme, Inc
Headquarters
Shelly Smith
Genwatt, Inc
Headquarters
Tom Thompson
Gene Points
Headquarters
Cancel
Create


Report Type: Accounts
Unsaved Report
Save
Save As
Close
Report Properties
Fields
All
Quick Find
Drag and drop to add fields to the report.
Bucket Fields
Add Bucket Field
Account General
Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
To add filters, click Add.
All Time
Custom
Fiscal Year

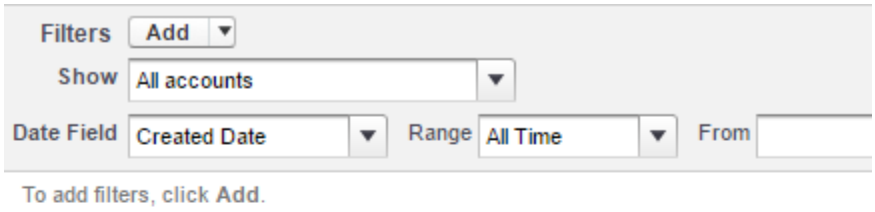

Report Type: Accounts
Unsaved Report
Save
Save As
Close
Report Properties
Dashboard Settings
Fields
All
emp
Drag and drop to add fields to the report.
Account General
Employees
Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
To
Type contains "Customer"
Row limit 5, sorted by Employees, Descending
Preview
Tabular Format
Show
Remove All Columns
Account Owner
Account Name
Type
Employees
Alvin Lee
United Oil & Gas, UK
Customer - Direct
24,000
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
9,000
Johan Yu
United Oil & Gas, Singapore
Customer - Direct
3,000
Johan Yu
Edge Communications
Customer - Direct
1,000
Johan Yu
GenePoint
Customer - Channel
265
Grand Totals (5 records)
This preview shows a limited number of records. Run the report to see all results.

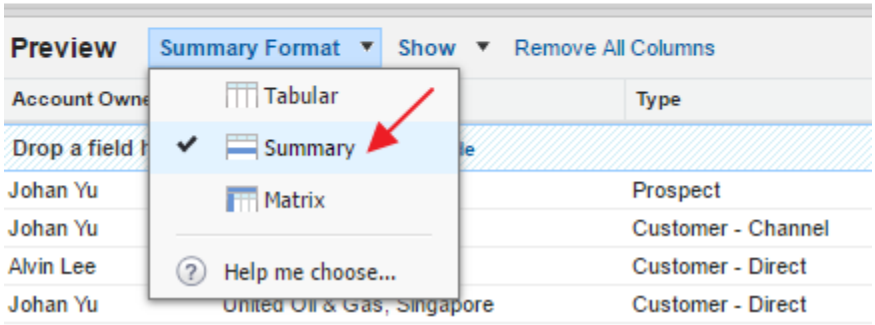
REPORT
Top 5 Customers by No of Employee
Edit
Total Records
5
Filters
ACCOUNT OWNER
ACCOUNT NAME
TYPE
EMPLOYEES
Alvin Lee
United Oil & Gas Corp.
Customer - Direct
145,000
Johan Yu
University of Arizona
Customer - Direct
39,000
Alvin Lee
United Oil & Gas, UK
Customer - Direct
24,000
Johan Yu
Express Logistics and Transport
Customer - Channel
12,300
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
9,000
Grand Total
(5 records)
Show Me
All accounts
Created Date
All time
Type
contains Customer

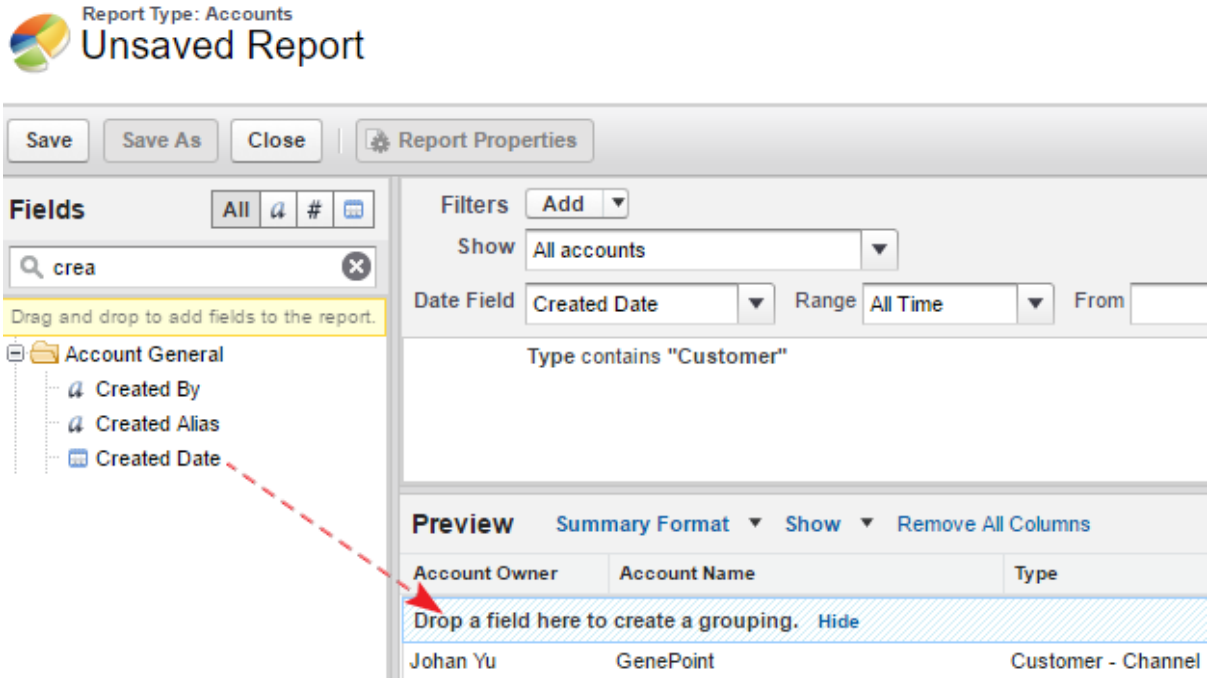
REPORT
Summary Customers

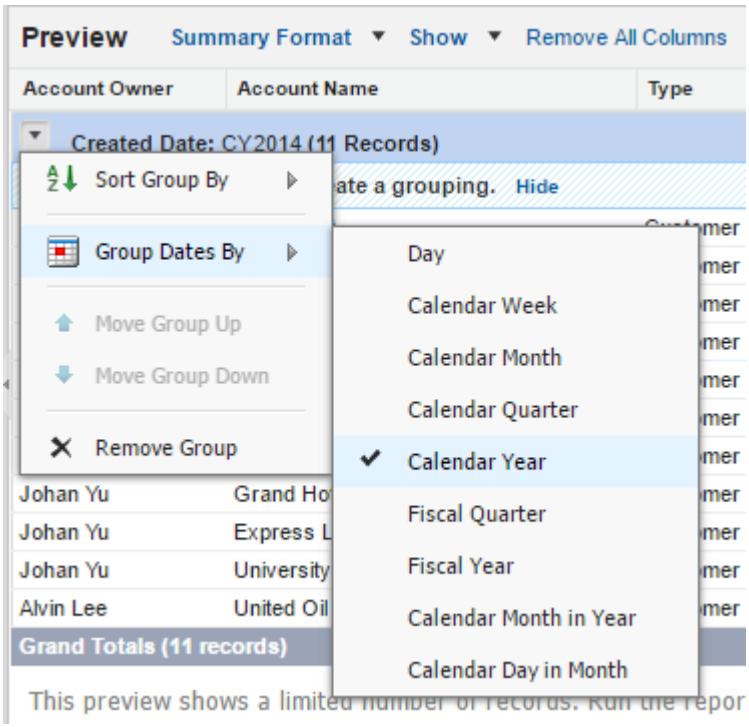
Total Records
14

TYPE	ACCOUNT OWNER	LAST MODIFIED DATE	ACCOUNT NAME	EMPLOYEES
Prospect (3 records)	Alvin Lee (1 record)	CY2017 (1 record)	Element Industry Ltd	500
	Johan Yu (2 records)	CY2017 (2 records)	Super Force Inc	800
			PMA Manufacturing	1,500
Customer - Direct (7 records)	Johan Yu (7 records)	CY2014 (7 records)	Edge Communications	1,000
			United Oil & Gas, Singapore	3,000
			Grand Hotels & Resorts Ltd	5,600
			Burlington Textiles Corp of America	9,000
			United Oil & Gas, UK	24,000
			University of Arizona	39,000
			United Oil & Gas Corp.	145,000
Customer - Channel (4 records)	Johan Yu (4 records)	CY2014 (3 records)	Dickenson plc	120
			GenePoint	265
			Express Logistics and Transport	12,300
		CY2016 (1 record)	Pyramid Construction Inc.	2,680
GRAND TOTAL (14 RECORDS)				


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
To add filters, click Add.


Preview
Summary Format
Show
Remove All Columns
Tabular
Summary
Matrix
Help me choose...
Account Owne
Type
Drop a field h
Johan Yu
Prospect
Johan Yu
Customer - Channel
Alvin Lee
Customer - Direct
Johan Yu
Customer - Direct


Report Type: Accounts
Unsaved Report
Save
Save As
Close
Report Properties
Fields
All
crea
Drag and drop to add fields to the report.
Account General
Created By
Created Alias
Created Date
Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
Type contains "Customer"
Preview
Summary Format
Show
Remove All Columns
Account Owner
Account Name
Type
Drop a field here to create a grouping.
Hide
Johan Yu
GenePoint
Customer - Channel


Preview
Summary Format
Show
Remove All Columns
Account Owner
Account Name
Type
Created Date: CY2014 (11 Records)
Sort Group By
Group Dates By
Move Group Up
Move Group Down
Remove Group
ate a grouping.
Hide
Day
Calendar Week
Calendar Month
Calendar Quarter
Calendar Year
Fiscal Quarter
Fiscal Year
Calendar Month in Year
Calendar Day in Month
Johan Yu
Johan Yu
Johan Yu
Alvin Lee
Grand Totals (11 records)
This preview shows a limited

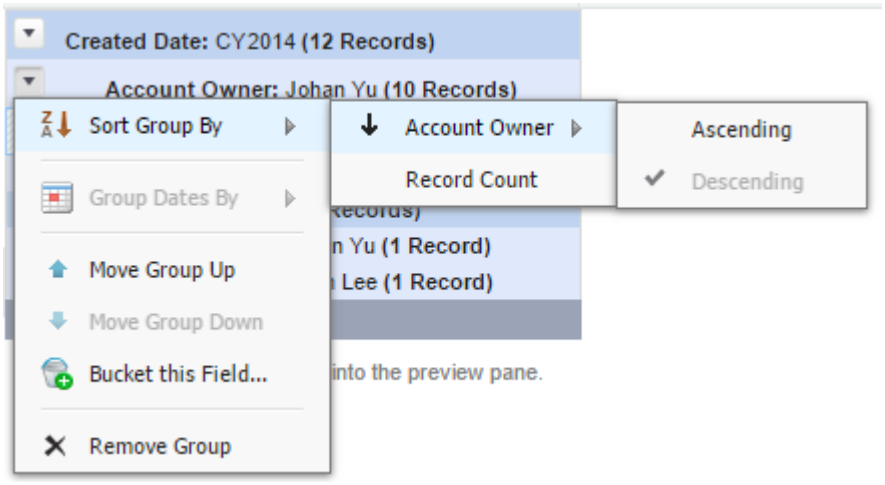
REPORT

All Account by creation Year and owner

Total Records

14

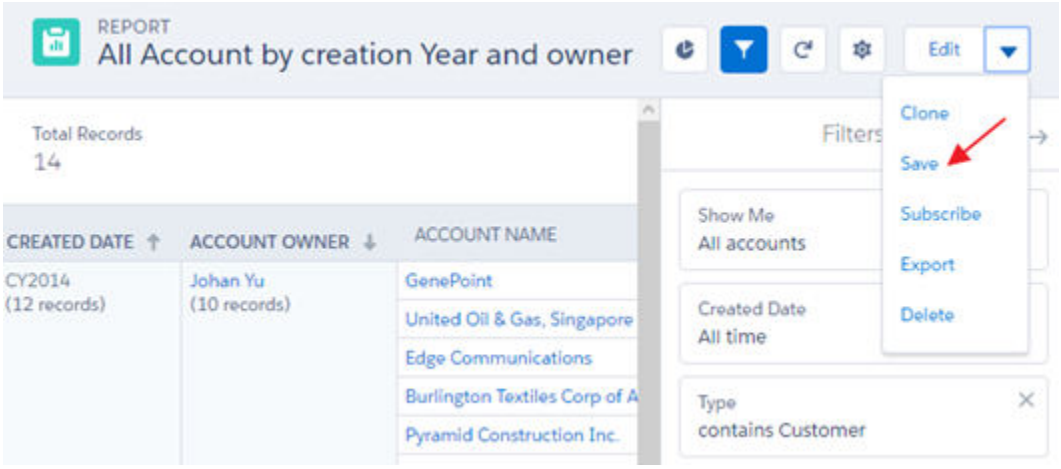
CREATED DATE	ACCOUNT OWNER	RECORD COUNT
CY2014	Alvin Lee	2
	Johan Yu	10
Subtotal		12
CY2015	Alvin Lee	1
	Johan Yu	1
Subtotal		2
GRAND TOTAL		14



REPORT
All Account by creation Year and owner

Total Records
14

CREATED DATE	ACCOUNT OWNER	ACCOUNT NAME	TYPE	LAST MODIFIED DATE
CY2014 (12 records)	Johan Yu (10 records)	GenePoint	Customer - Channel	5/24/2014
		United Oil & Gas, Singapore	Customer - Direct	5/24/2014
		Edge Communications	Customer - Direct	5/24/2014
		Burlington Textiles Corp of America	Customer - Direct	5/24/2014
		Pyramid Construction Inc.	Customer - Channel	8/21/2016
		Dickenson plc	Customer - Channel	5/24/2014
		Grand Hotels & Resorts Ltd	Customer - Direct	5/24/2014
		Express Logistics and Transport	Customer - Channel	5/24/2014
		University of Arizona	Customer - Direct	5/24/2014
		Super Force Inc	Customer - Direct	4/15/2017
	Alvin Lee (2 records)	United Oil & Gas, UK	Customer - Direct	4/14/2017
		United Oil & Gas Corp.	Customer - Direct	4/14/2017
CY2015 (2 records)	Johan Yu (1 record)	King Inc	Customer - Direct	4/15/2017
	Alvin Lee (1 record)	Accurate Glass	Customer - Channel	4/15/2017
GRAND TOTAL (14 RECORDS)				


REPORT
All Account by creation Year and owner
Edit
Clone
Save
Subscribe
Export
Delete
Total Records
14
Filters
Show Me
All accounts
Created Date
All time
Type
contains Customer
CREATED DATE
ACCOUNT OWNER
ACCOUNT NAME
CY2014
(12 records)
Johan Yu
(10 records)
GenePoint
United Oil & Gas, Singapore
Edge Communications
Burlington Textiles Corp of A
Pyramid Construction Inc.

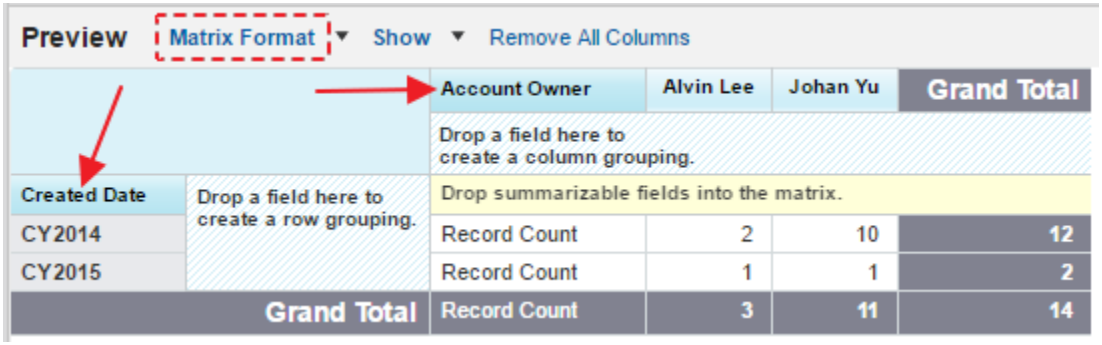
REPORT

Account by creation Year and owner mtrx

Total Records
14

ACCOUNT OWNER	JOHAN YU	ALVIN LEE	Total				
CREATED DATE	COUNT	COUNT	COUNT	ACCOUNT NAME	TYPE	LAST MODIFIED DATE	EMPLOYEES
CY2014	1			GenePoint	Customer - Channel	5/24/2014	265
	1			United Oil & Gas, Singapore	Customer - Direct	5/24/2014	3,000
	1			Burlington Textiles Corp of America	Customer - Direct	5/24/2014	9,000
	1			Dickenson plc	Customer - Channel	5/24/2014	120
	1			Express Logistics and Transport	Customer - Channel	5/24/2014	12,300
	1			University of Arizona	Customer - Direct	5/24/2014	39,000
	1			Super Force Inc	Customer - Direct	4/15/2017	800
	1			Grand Hotels & Resorts Ltd	Customer - Direct	5/24/2014	5,600
	1			Pyramid Construction Inc.	Customer - Channel	8/21/2016	2,680
	1			Edge Communications	Customer - Direct	5/24/2014	1,000
		1		United Oil & Gas, UK	Customer - Direct	4/14/2017	24,000
		1		United Oil & Gas Corp.	Customer - Direct	4/14/2017	145,000
Subtotal	10	2	12				
CY2015	1			King Inc	Customer - Direct	4/15/2017	-
		1		Accurate Glass	Customer - Channel	4/15/2017	-
Subtotal	1	1	2				
Total	11	3	14				

Preview
Summary Format
Show
Remove All Columns
Created Date: CY2014 (12 Records)
Account Owner: Alvin Lee (2 Records)
Drop a field here to create a grouping.
Account Owner: Johan Yu (10 Records)
Created Date: CY2015 (2 Records)
Account Owner: Alvin Lee (1 Record)
Account Owner: Johan Yu (1 Record)
Grand Totals (14 records)

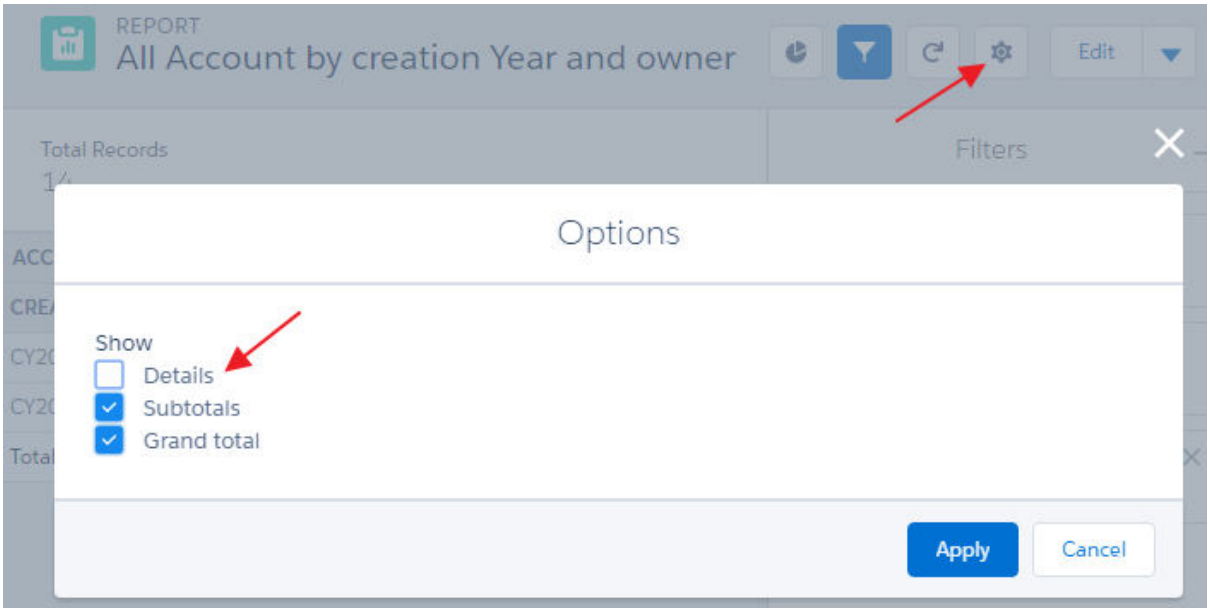

Preview
Matrix Format
Show
Remove All Columns
Account Owner
Alvin Lee
Johan Yu
Grand Total
Drop a field here to create a column grouping.
Created Date
Drop a field here to create a row grouping.
Drop summarizable fields into the matrix.
CY2014
Record Count
2
10
12
CY2015
Record Count
1
1
2
Grand Total
Record Count
3
11
14

REPORT

All Account by creation Year and owner

Total Records
14

ACCOUNT OWNER	ALVIN LEE	JOHAN YU	Total				
CREATED DATE	COUNT	COUNT	COUNT	ACCOUNT NAME	TYPE	LAST MODIFIED DATE	EMPLOYEES
CY2014	1			United Oil & Gas, UK	Customer - Direct	4/14/2017	24,000
	1			United Oil & Gas Corp.	Customer - Direct	4/14/2017	145,000
		1		GenePoint	Customer - Channel	5/24/2014	265
		1		Burlington Textiles Corp of America	Customer - Direct	5/24/2014	9,000
		1		Dickenson plc	Customer - Channel	5/24/2014	120
		1		Express Logistics and Transport	Customer - Channel	5/24/2014	12,300
		1		Super Force Inc	Customer - Direct	4/15/2017	800
		1		University of Arizona	Customer - Direct	5/24/2014	39,000
		1		Grand Hotels & Resorts Ltd	Customer - Direct	5/24/2014	5,600
		1		Pyramid Construction Inc.	Customer - Channel	8/21/2016	2,680
		1		Edge Communications	Customer - Direct	5/24/2014	1,000
		1		United Oil & Gas, Singapore	Customer - Direct	5/24/2014	3,000
Subtotal	2	10	12				
CY2015	1			Accurate Glass	Customer - Channel	4/15/2017	-
		1		King Inc	Customer - Direct	4/15/2017	-
Subtotal	1	1	2				
Total	3	11	14				



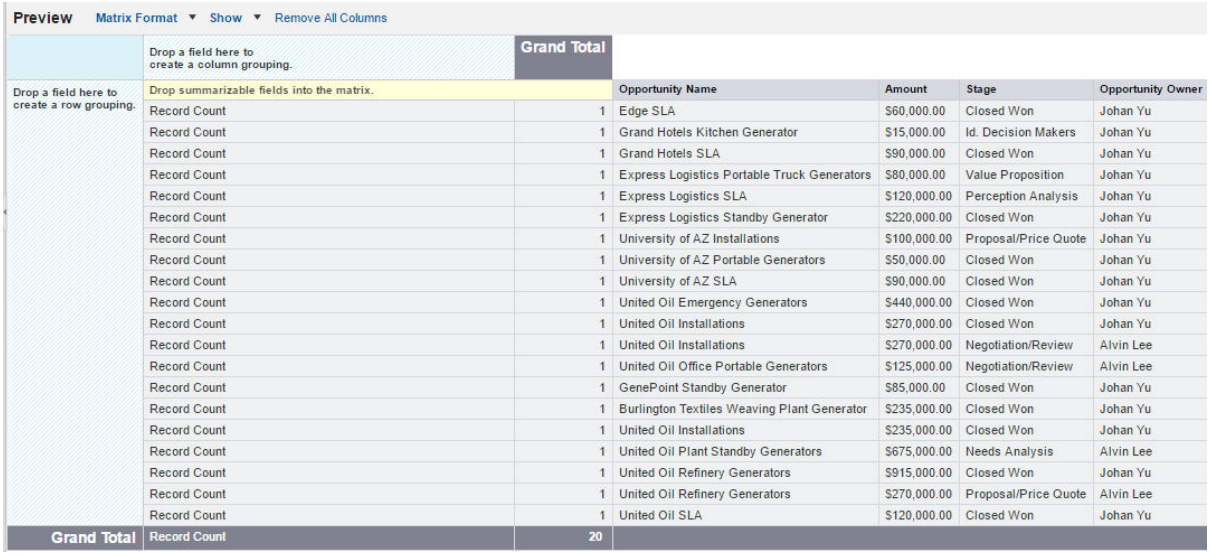
REPORT

All Account by creation Year and owner

Total Records

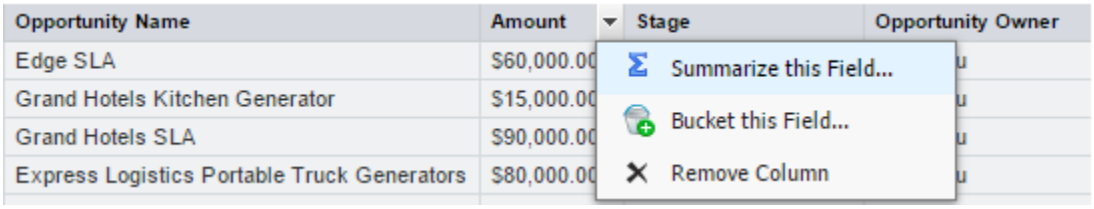
14

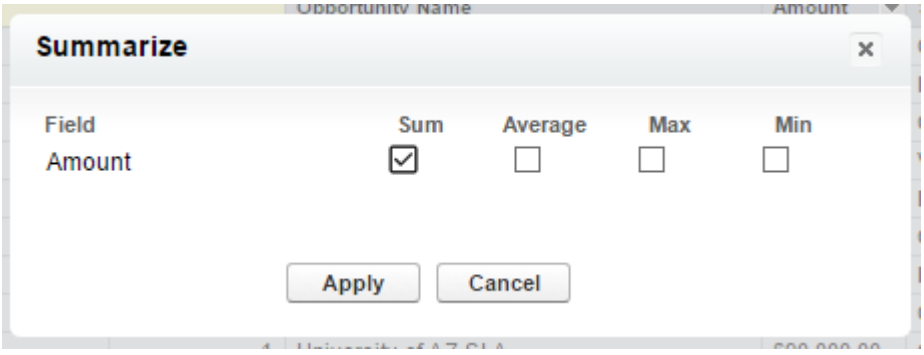
ACCOUNT OWNER	ALVIN LEE	JOHAN YU	Total
CREATED DATE	COUNT	COUNT	COUNT
CY2014	2	10	12
CY2015	1	1	2
Total	3	11	14



Preview Matrix Format Show Remove All Columns

	Drop a field here to create a column grouping.	Grand Total				
Drop a field here to create a row grouping.	Drop summarizable fields into the matrix.		Opportunity Name	Amount	Stage	Opportunity Owner
	Record Count	1	Edge SLA	$60,000.00	Closed Won	Johan Yu
	Record Count	1	Grand Hotels Kitchen Generator	$15,000.00	Id. Decision Makers	Johan Yu
	Record Count	1	Grand Hotels SLA	$90,000.00	Closed Won	Johan Yu
	Record Count	1	Express Logistics Portable Truck Generators	$80,000.00	Value Proposition	Johan Yu
	Record Count	1	Express Logistics SLA	$120,000.00	Perception Analysis	Johan Yu
	Record Count	1	Express Logistics Standby Generator	$220,000.00	Closed Won	Johan Yu
	Record Count	1	University of AZ Installations	$100,000.00	Proposal/Price Quote	Johan Yu
	Record Count	1	University of AZ Portable Generators	$50,000.00	Closed Won	Johan Yu
	Record Count	1	University of AZ SLA	$90,000.00	Closed Won	Johan Yu
	Record Count	1	United Oil Emergency Generators	$440,000.00	Closed Won	Johan Yu
	Record Count	1	United Oil Installations	$270,000.00	Closed Won	Johan Yu
	Record Count	1	United Oil Installations	$270,000.00	Negotiation/Review	Alvin Lee
	Record Count	1	United Oil Office Portable Generators	$125,000.00	Negotiation/Review	Alvin Lee
	Record Count	1	GenePoint Standby Generator	$85,000.00	Closed Won	Johan Yu
	Record Count	1	Burlington Textiles Weaving Plant Generator	$235,000.00	Closed Won	Johan Yu
	Record Count	1	United Oil Installations	$235,000.00	Closed Won	Johan Yu
	Record Count	1	United Oil Plant Standby Generators	$675,000.00	Needs Analysis	Alvin Lee
	Record Count	1	United Oil Refinery Generators	$915,000.00	Closed Won	Johan Yu
	Record Count	1	United Oil Refinery Generators	$270,000.00	Proposal/Price Quote	Alvin Lee
	Record Count	1	United Oil SLA	$120,000.00	Closed Won	Johan Yu
Grand Total	Record Count	20				





REPORT

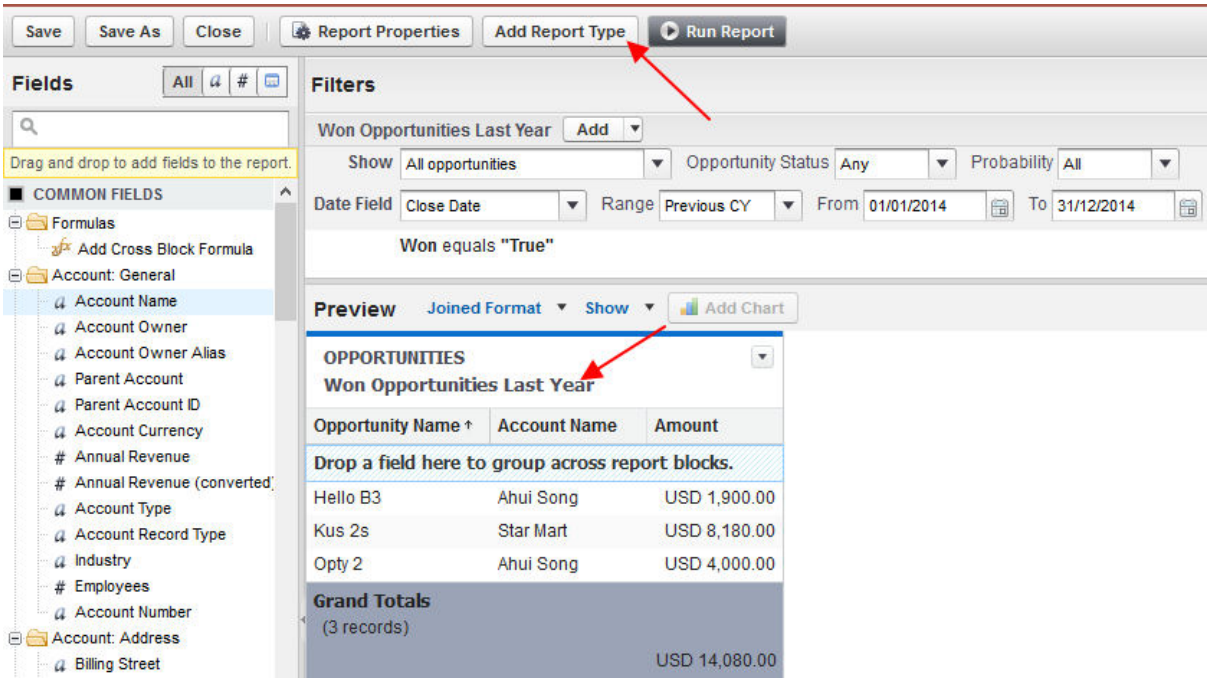
Opportunity by Stage and Owner

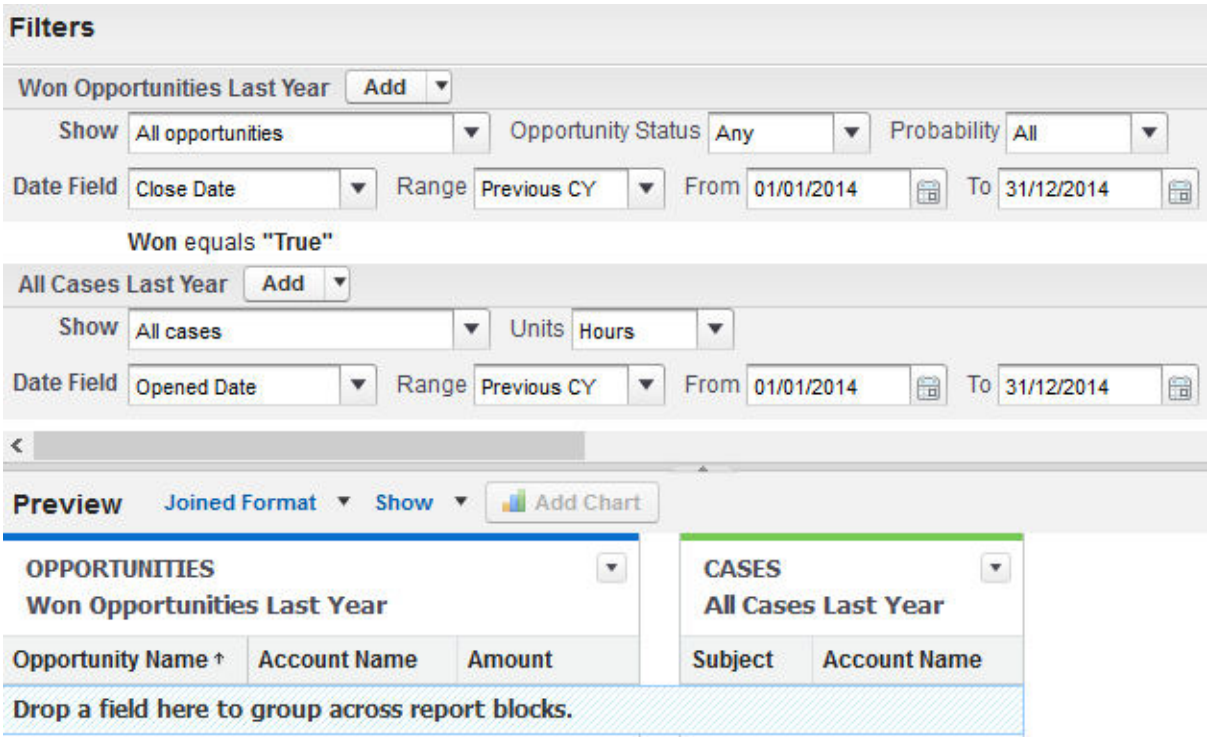
Total Amount

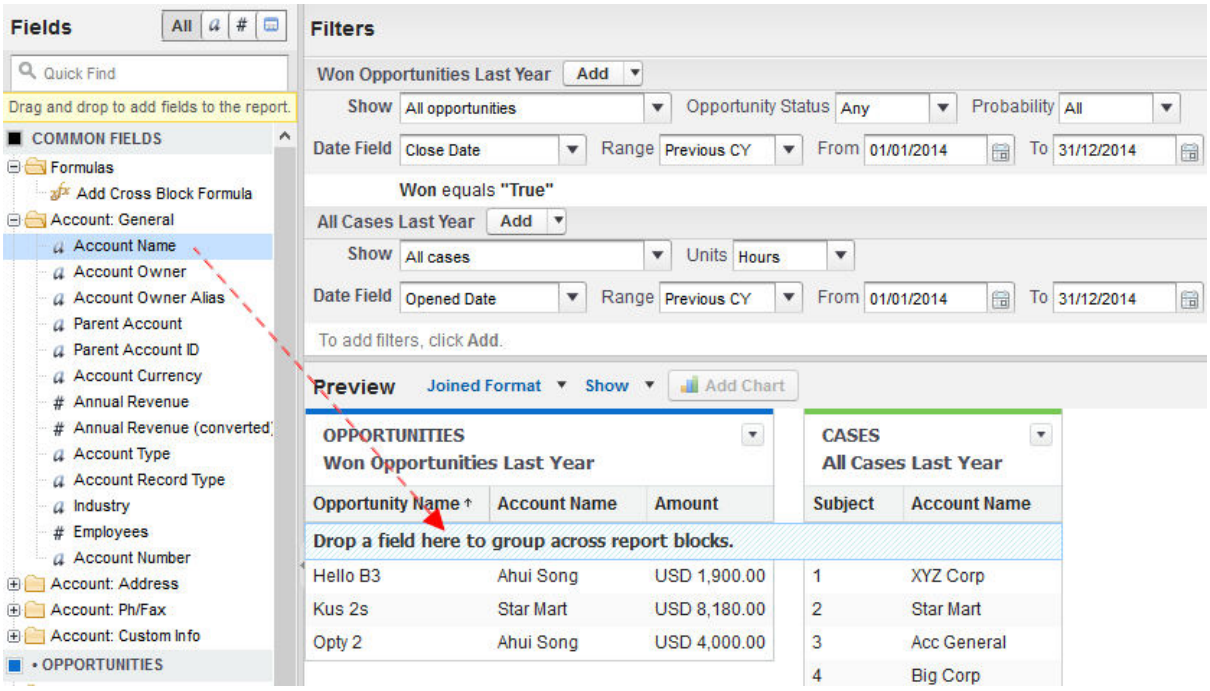
$5,911,000.00

OPPORTUNITY OWNER	ALVIN LEE	JOHAN YU	Total
STAGE	AMOUNT Sum	AMOUNT Sum	AMOUNT Sum
Prospecting	$0.00	$80,000.00	$80,000.00
Qualification	$0.00	$115,000.00	$115,000.00
Needs Analysis	$675,000.00	$0.00	$675,000.00
Value Proposition	$0.00	$330,000.00	$330,000.00
Id. Decision Makers	$0.00	$110,000.00	$110,000.00
Perception Analysis	$0.00	$120,000.00	$120,000.00
Proposal/Price Quote	$270,000.00	$100,000.00	$370,000.00
Negotiation/Review	$395,000.00	$0.00	$395,000.00
Closed Won	$0.00	$3,716,000.00	$3,716,000.00
Total	$1,340,000.00	$4,571,000.00	$5,911,000.00

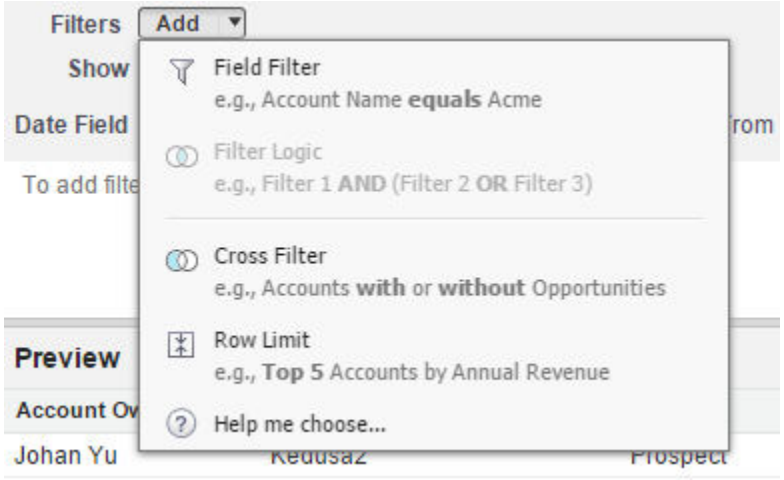
	OPPORTUNITIES Won Opportunities		CASES All Cases
	Record Count	Amount	Record Count
Account Name: ABC Song	1	USD 800.00	
Account Name: Acc General	1	USD 35,000.00	1
Account Name: Acme Corp	2	USD 19,002.00	3
Account Name: Ahui Jack	1	USD 71,000.00	
Account Name: Ahui Maria			2
Account Name: Ahui Song	1	USD 40.00	1
Account Name: Big Corp	1	USD 750.00	2
Account Name: Firing Air	1	USD 11,000.00	1
Account Name: Gajah	1	USD 5,000.00	
Account Name: Global Data	1	USD 500,000.00	3
Account Name: Kisaran Corp	2	USD 205,500.00	1
Account Name: New Water Ltd	1	USD 250.00	
Account Name: Star Mart	2	USD 100,180.00	1
Account Name: XYZ Corp			1
Grand Totals	15	USD 948,522.00	16

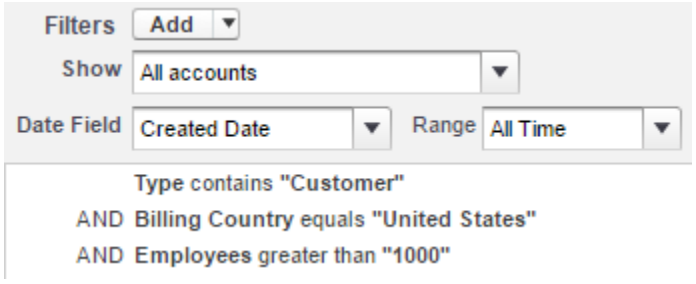

Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Drag and drop to add fields to the report.
COMMON FIELDS
Formulas
Add Cross Block Formula
Account: General
Account Name
Account Owner
Account Owner Alias
Parent Account
Parent Account ID
Account Currency
Annual Revenue
Annual Revenue (converted)
Account Type
Account Record Type
Industry
Employees
Account Number
Account: Address
Billing Street
Filters
Won Opportunities Last Year
Add
Show
All opportunities
Opportunity Status
Any
Probability
All
Date Field
Close Date
Range
Previous CY
From
01/01/2014
To
31/12/2014
Won equals "True"
Preview
Joined Format
Show
Add Chart
OPPORTUNITIES
Won Opportunities Last Year
Opportunity Name
Account Name
Amount
Drop a field here to group across report blocks.
Hello B3
Ahui Song
USD 1,900.00
Kus 2s
Star Mart
USD 8,180.00
Opty 2
Ahui Song
USD 4,000.00
Grand Totals
(3 records)
USD 14,080.00

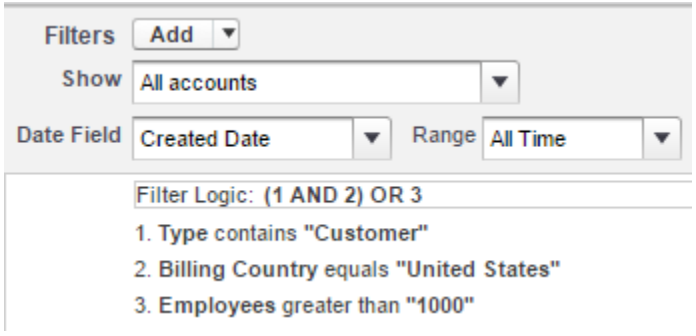

Filters
Won Opportunities Last Year
Add
Show
All opportunities
Opportunity Status
Any
Probability
All
Date Field
Close Date
Range
Previous CY
From
01/01/2014
To
31/12/2014
Won equals "True"
All Cases Last Year
Add
Show
All cases
Units
Hours
Date Field
Opened Date
Range
Previous CY
From
01/01/2014
To
31/12/2014
Preview
Joined Format
Show
Add Chart
OPPORTUNITIES
Won Opportunities Last Year
Opportunity Name
Account Name
Amount
CASES
All Cases Last Year
Subject
Account Name
Drop a field here to group across report blocks.

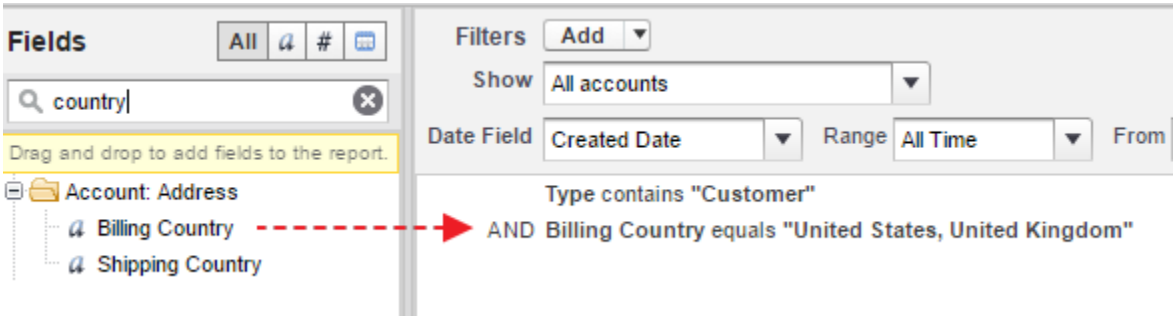


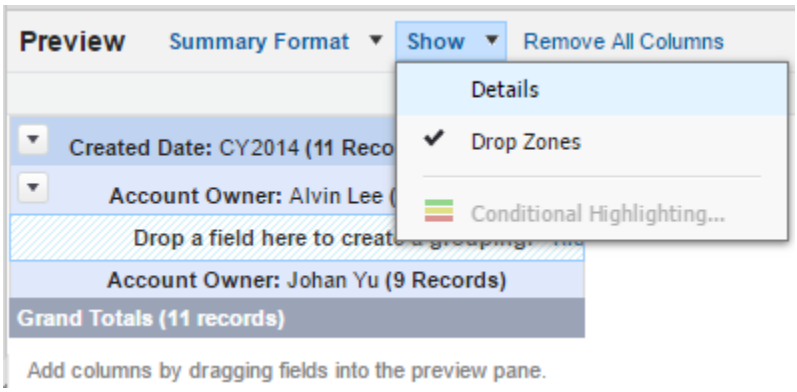
	OPPORTUNITIES Won Opportunities Last Year		CASES All Cases Last Year
	Record Count	Amount	Record Count
Account Name: Acc General			1
Account Name: Ahui Song	2	USD 5,900.00	1
Account Name: Big Corp	1	USD 85,200.00	1
Account Name: Firing Air			1
Account Name: Global Data	1	USD 15,000.00	2
Account Name: Kisaran Corp			1
Account Name: Star Mart	1	USD 8,180.00	1
Account Name: XYZ Corp			1
Grand Totals	5	USD 114,280.00	9

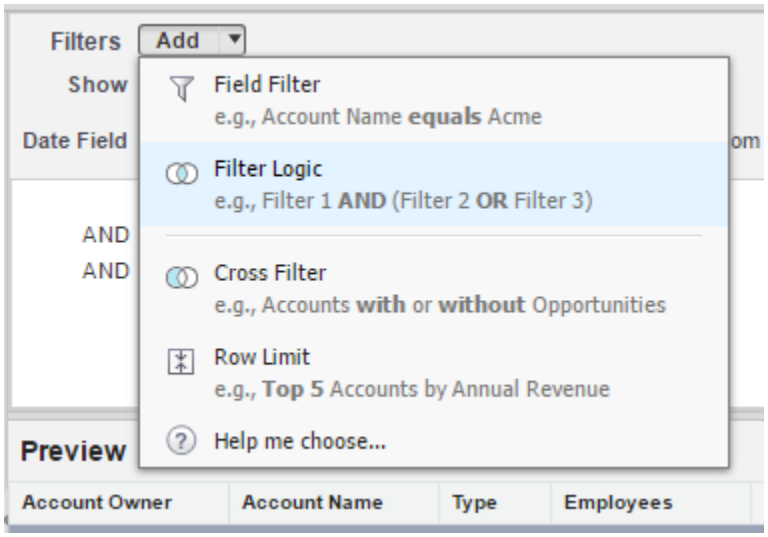

Filters
Add
Show
Field Filter
e.g., Account Name equals Acme
Date Field
Filter Logic
e.g., Filter 1 AND (Filter 2 OR Filter 3)
To add filte
Cross Filter
e.g., Accounts with or without Opportunities
Row Limit
e.g., Top 5 Accounts by Annual Revenue
Preview
Account Ov
Help me choose...
Johan Yu
Prospect


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
Type contains "Customer"
AND Billing Country equals "United States"
AND Employees greater than "1000"


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
Filter Logic: (1 AND 2) OR 3
1. Type contains "Customer"
2. Billing Country equals "United States"
3. Employees greater than "1000"


Fields
All
country
Drag and drop to add fields to the report.
Account: Address
Billing Country
Shipping Country
Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
Type contains "Customer"
AND Billing Country equals "United States, United Kingdom"


Preview
Summary Format
Show
Remove All Columns
Details
Drop Zones
Conditional Highlighting...
Created Date: CY2014 (11 Reco
Account Owner: Alvin Lee (
Drop a field here to create a grouping
Account Owner: Johan Yu (9 Records)
Grand Totals (11 records)
Add columns by dragging fields into the preview pane.



ACCOUNT OWNER	ACCOUNT NAME	TYPE	EMPLOYEES	BILLING COUNTRY
Johan Yu	PMA Manufacturing	Prospect	1,500	-
Alvin Lee	United Oil & Gas, UK	Customer - Direct	24,000	-
Johan Yu	United Oil & Gas, Singapore	Customer - Direct	3,000	-
Johan Yu	Burlington Textiles Corp of America	Customer - Direct	9,000	USA
Johan Yu	Pyramid Construction Inc.	Customer - Channel	2,680	France
Johan Yu	Grand Hotels & Resorts Ltd	Customer - Direct	5,600	-
Johan Yu	Express Logistics and Transport	Customer - Channel	12,300	-
Johan Yu	University of Arizona	Customer - Direct	39,000	-
Alvin Lee	United Oil & Gas Corp.	Customer - Direct	145,000	-
Johan Yu	Super Force Inc	Customer - Direct	800	United States
Alvin Lee	Accurate Glass	Customer - Channel	-	United States
Johan Yu	Quality Materials	Customer - Channel	-	United Kingdom
Grand Total (12 records)				

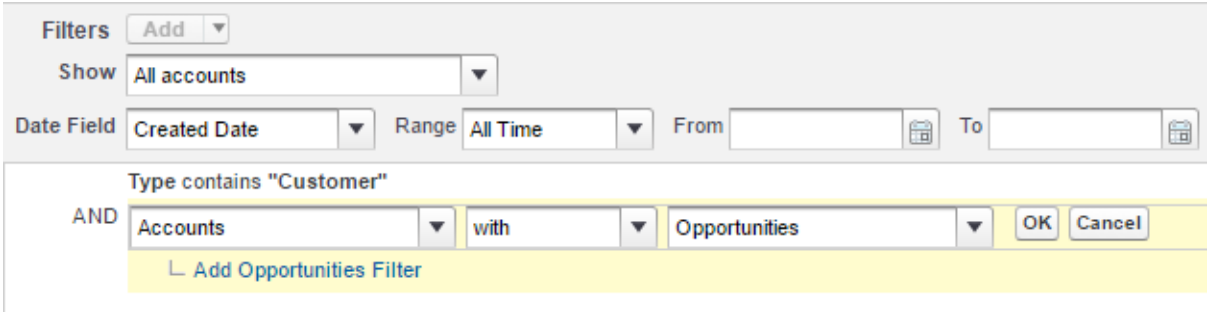
Show Me
All accounts

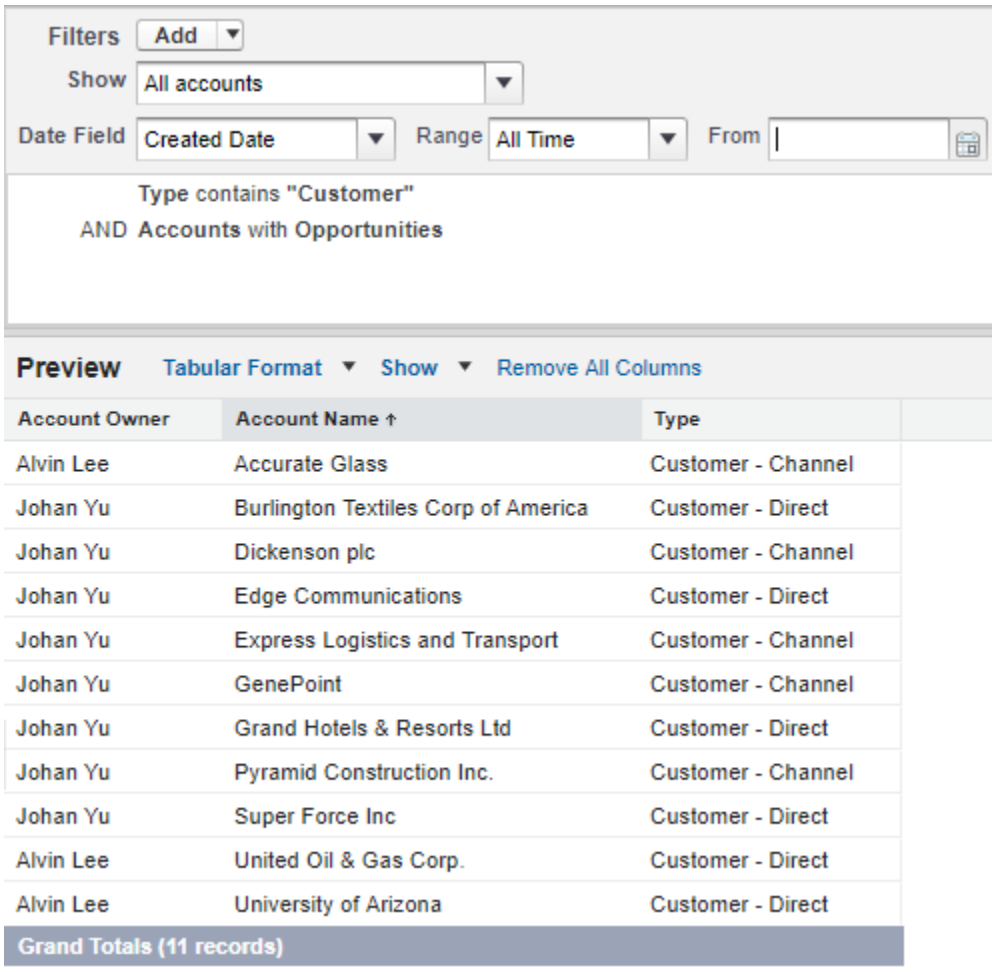
Created Date
All time

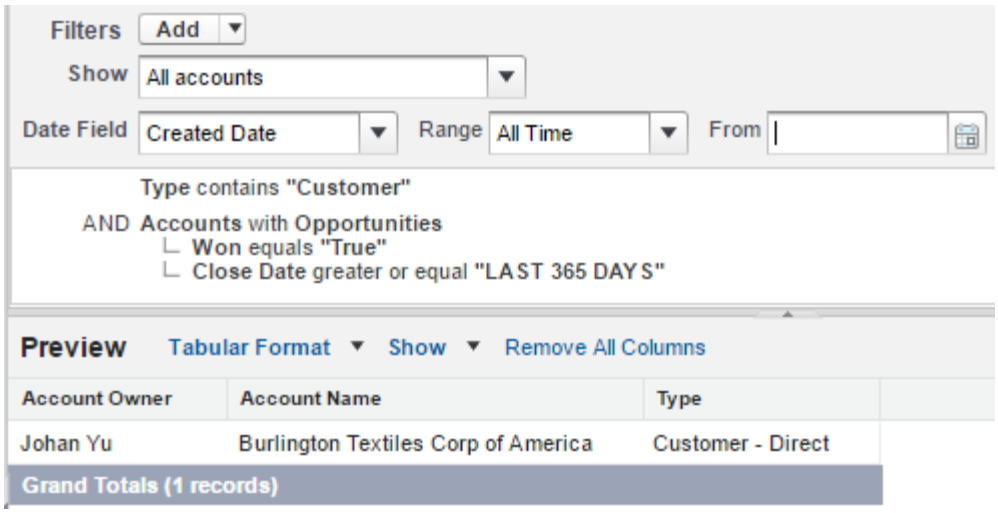
Locked Filters

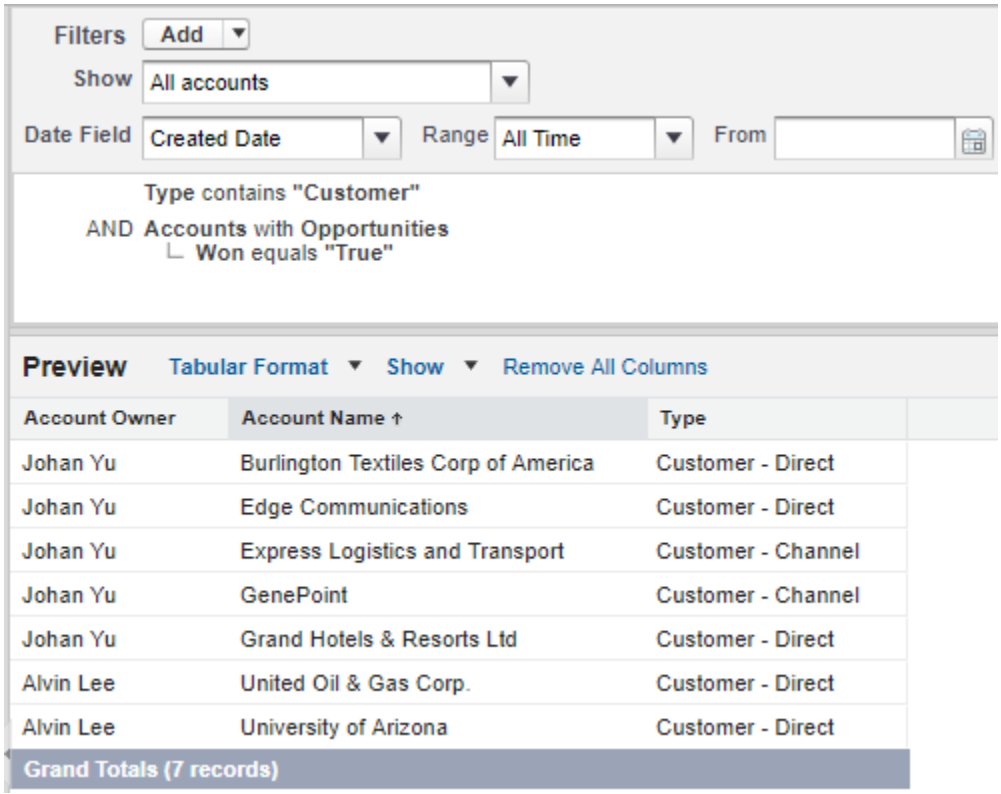
(1 AND 2) OR 3

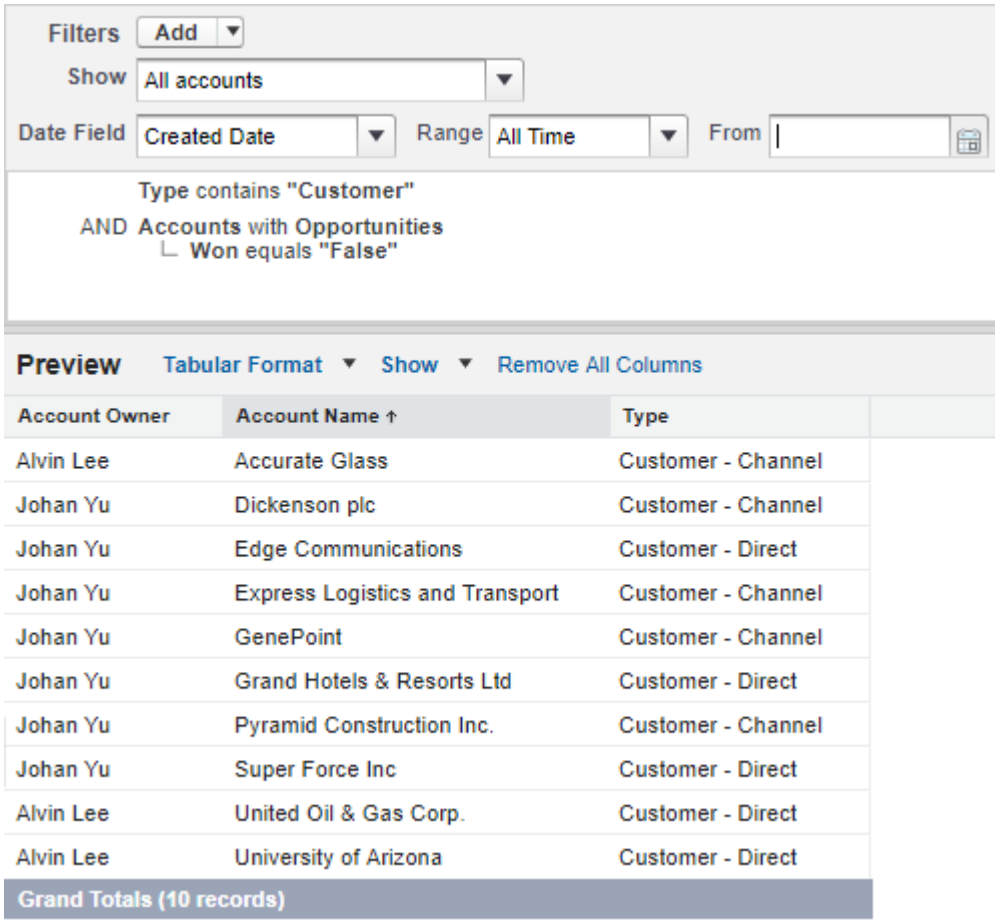
1. Type contains Customer
2. Billing Country equals United States, United Kingdom
3. Employees greater than "1,000"


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
To
Type contains "Customer"
AND
Accounts
with
Opportunities
OK
Cancel
Add Opportunities Filter


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
Type contains "Customer"
AND Accounts with Opportunities
Preview
Tabular Format
Show
Remove All Columns
Account Owner
Account Name
Type
Alvin Lee
Accurate Glass
Customer - Channel
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
Johan Yu
Dickenson plc
Customer - Channel
Johan Yu
Edge Communications
Customer - Direct
Johan Yu
Express Logistics and Transport
Customer - Channel
Johan Yu
GenePoint
Customer - Channel
Johan Yu
Grand Hotels & Resorts Ltd
Customer - Direct
Johan Yu
Pyramid Construction Inc.
Customer - Channel
Johan Yu
Super Force Inc
Customer - Direct
Alvin Lee
United Oil & Gas Corp.
Customer - Direct
Alvin Lee
University of Arizona
Customer - Direct
Grand Totals (11 records)


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
Type contains "Customer"
AND Accounts with Opportunities
Won equals "True"
Close Date greater or equal "LAST 365 DAYS"
Preview
Tabular Format
Show
Remove All Columns
Account Owner
Account Name
Type
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
Grand Totals (1 records)


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
Type contains "Customer"
AND Accounts with Opportunities
Won equals "True"
Preview
Tabular Format
Show
Remove All Columns
Account Owner
Account Name
Type
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
Johan Yu
Edge Communications
Customer - Direct
Johan Yu
Express Logistics and Transport
Customer - Channel
Johan Yu
GenePoint
Customer - Channel
Johan Yu
Grand Hotels & Resorts Ltd
Customer - Direct
Alvin Lee
United Oil & Gas Corp.
Customer - Direct
Alvin Lee
University of Arizona
Customer - Direct
Grand Totals (7 records)


Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
Type contains "Customer"
AND Accounts with Opportunities
Won equals "False"
Preview
Tabular Format
Show
Remove All Columns
Account Owner
Account Name
Type
Alvin Lee
Accurate Glass
Customer - Channel
Johan Yu
Dickenson plc
Customer - Channel
Johan Yu
Edge Communications
Customer - Direct
Johan Yu
Express Logistics and Transport
Customer - Channel
Johan Yu
GenePoint
Customer - Channel
Johan Yu
Grand Hotels & Resorts Ltd
Customer - Direct
Johan Yu
Pyramid Construction Inc.
Customer - Channel
Johan Yu
Super Force Inc
Customer - Direct
Alvin Lee
United Oil & Gas Corp.
Customer - Direct
Alvin Lee
University of Arizona
Customer - Direct
Grand Totals (10 records)

Select Object to Summarize

Master Object: Account

Summarized Object: Opportunities

Select Roll-Up Type

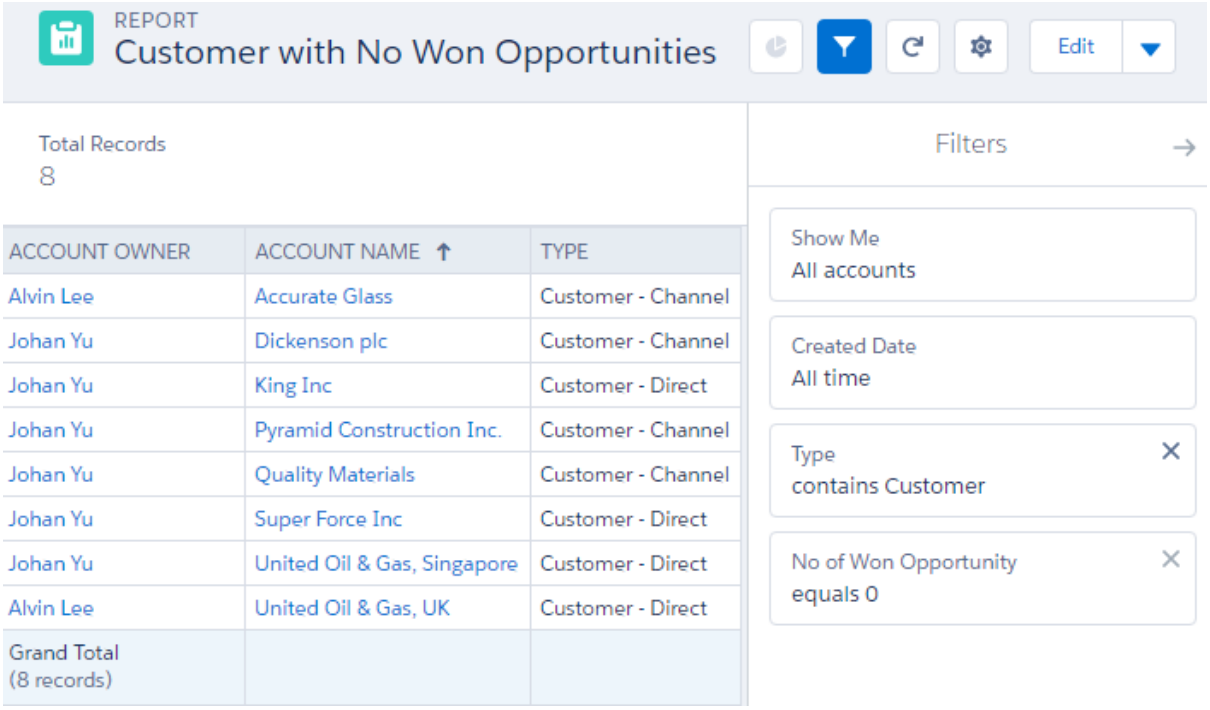
- (•) COUNT
- ( ) SUM
- ( ) MIN
- ( ) MAX

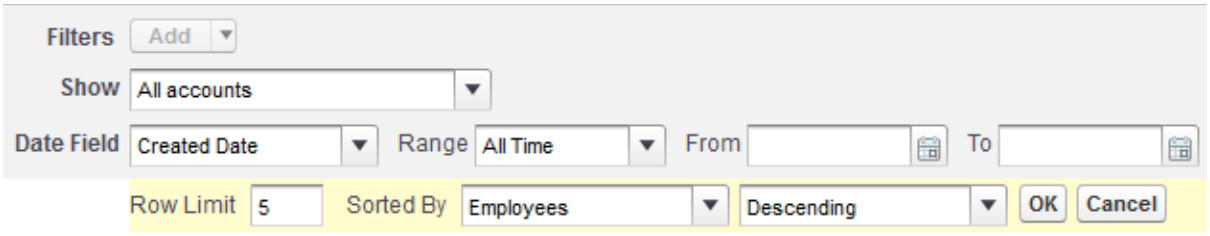
Field to Aggregate: --None--

Filter Criteria

- ( ) All records should be included in the calculation
- (•) Only records meeting certain criteria should be included in the calculation

Field	Operator	Value	
Won	equals	True	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		


REPORT
Customer with No Won Opportunities
Edit
Total Records
8
Filters
ACCOUNT OWNER
ACCOUNT NAME
TYPE
Alvin Lee
Accurate Glass
Customer - Channel
Johan Yu
Dickenson plc
Customer - Channel
Johan Yu
King Inc
Customer - Direct
Johan Yu
Pyramid Construction Inc.
Customer - Channel
Johan Yu
Quality Materials
Customer - Channel
Johan Yu
Super Force Inc
Customer - Direct
Johan Yu
United Oil & Gas, Singapore
Customer - Direct
Alvin Lee
United Oil & Gas, UK
Customer - Direct
Grand Total
(8 records)
Show Me
All accounts
Created Date
All time
Type
contains Customer
No of Won Opportunity
equals 0

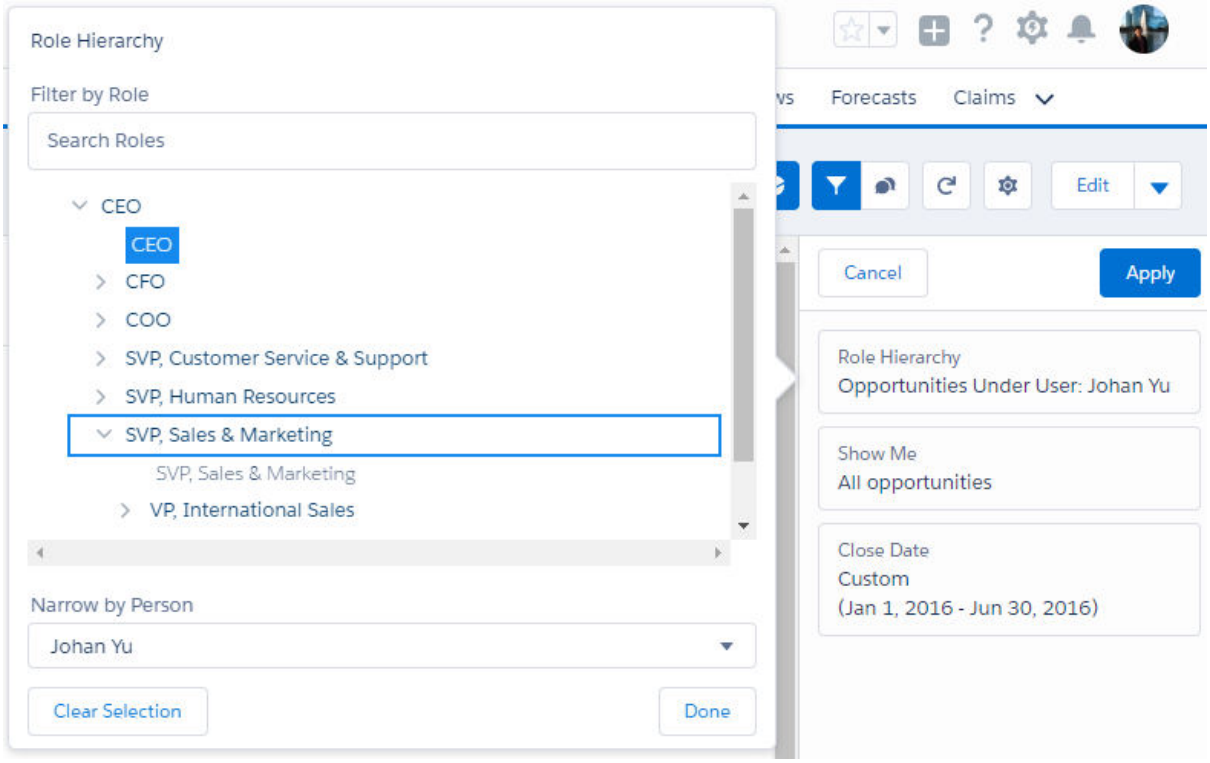

Filters
Add
Show
All accounts
Date Field
Created Date
Range
All Time
From
To
Row Limit
5
Sorted By
Employees
Descending
OK
Cancel

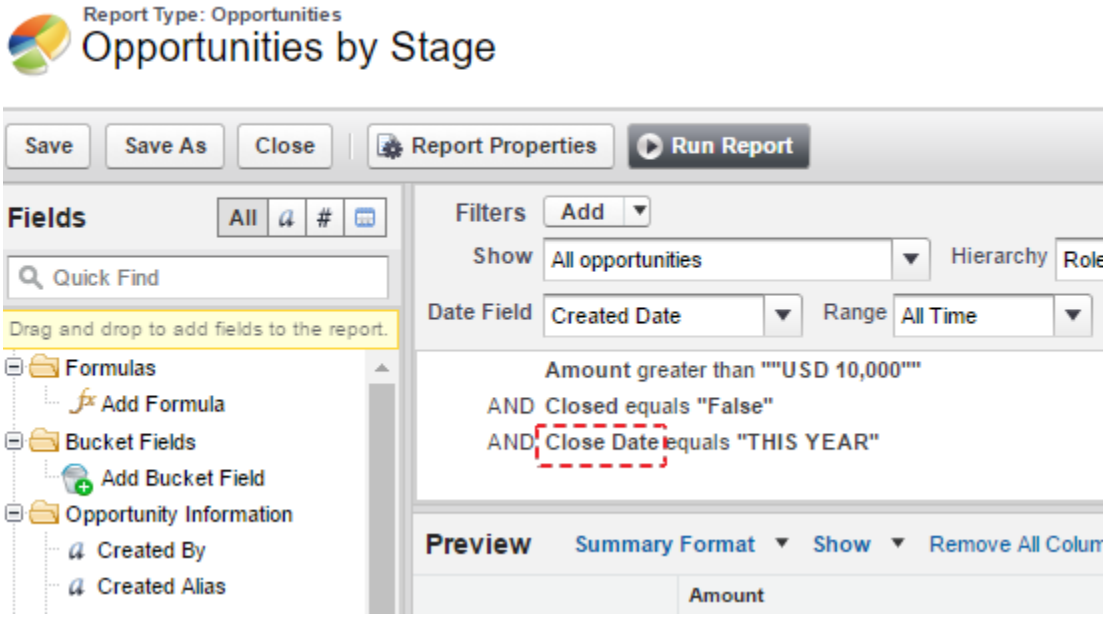
REPORT

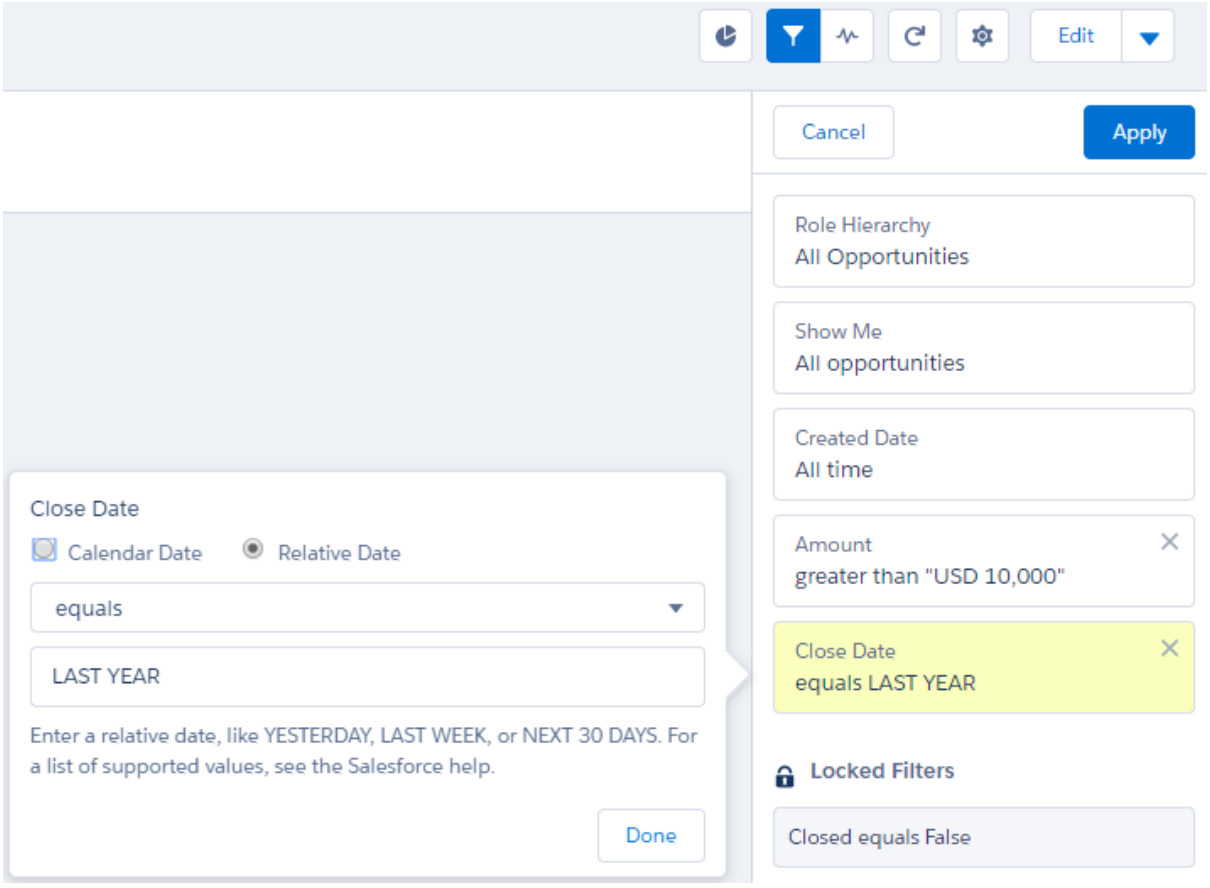
Top 5 Accounts by Employee

Total Records
5

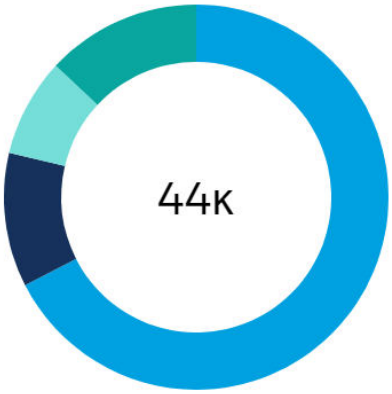
ACCOUNT OWNER	ACCOUNT NAME	EMPLOYEES ↓
Alvin Lee	United Oil & Gas Corp.	145,000
Johan Yu	University of Arizona	39,000
Alvin Lee	United Oil & Gas, UK	24,000
Johan Yu	Express Logistics and Transport	12,300
Johan Yu	Burlington Textiles Corp of America	9,000
Grand Total (5 records)		


Role Hierarchy
Filter by Role
Search Roles
CEO
CEO
CFO
COO
SVP, Customer Service & Support
SVP, Human Resources
SVP, Sales & Marketing
SVP, Sales & Marketing
VP, International Sales
Narrow by Person
Johan Yu
Clear Selection
Done
Forecasts
Claims
Edit
Cancel
Apply
Role Hierarchy
Opportunities Under User: Johan Yu
Show Me
All opportunities
Close Date
Custom
(Jan 1, 2016 - Jun 30, 2016)


Report Type: Opportunities
Opportunities by Stage
Save
Save As
Close
Report Properties
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Formulas
Add Formula
Bucket Fields
Add Bucket Field
Opportunity Information
Created By
Created Alias
Filters
Add
Show
All opportunities
Hierarchy
Date Field
Created Date
Range
All Time
Amount greater than ""USD 10,000""
AND Closed equals "False"
AND Close Date equals "THIS YEAR"
Preview
Summary Format
Show
Amount


Edit
Cancel
Apply
Role Hierarchy
All Opportunities
Show Me
All opportunities
Created Date
All time
Amount
greater than "USD 10,000"
Close Date
equals LAST YEAR
Locked Filters
Closed equals False
Close Date
Calendar Date
Relative Date
equals
LAST YEAR
Enter a relative date, like YESTERDAY, LAST WEEK, or NEXT 30 DAYS. For a list of supported values, see the Salesforce help.
Done

Total Records	Total Amount	Average Amount	Maximum Amount	Minimum Amount
10	USD 44,472.80	USD 4,447.28	USD 30,000.00	USD 0.00



STAGE	RECORD COUNT	AMOUNT Sum	Avg	Min	Max
Needs Analysis	5	USD 30,000.00	USD 6,000.00	USD 0.00	USD 30,000.00
Value Proposition	2	USD 5,000.00	USD 2,500.00	USD 0.00	USD 5,000.00
Closed Won	1	USD 3,672.80	USD 3,672.80	USD 3,672.80	USD 3,672.80
Closed Lost	2	USD 5,800.00	USD 2,900.00	USD 0.00	USD 5,800.00
GRAND TOTAL	10	USD 44,472.80	USD 4,447.28	USD 0.00	USD 30,000.00

Filters

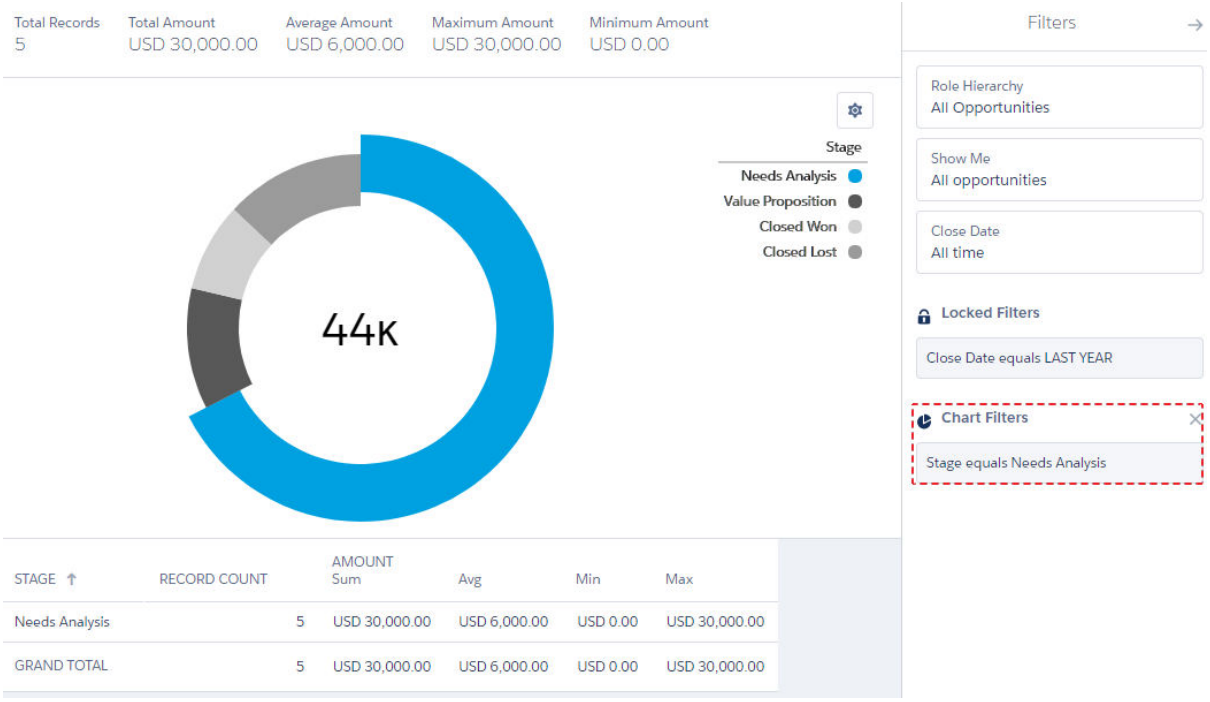
Role Hierarchy
All Opportunities

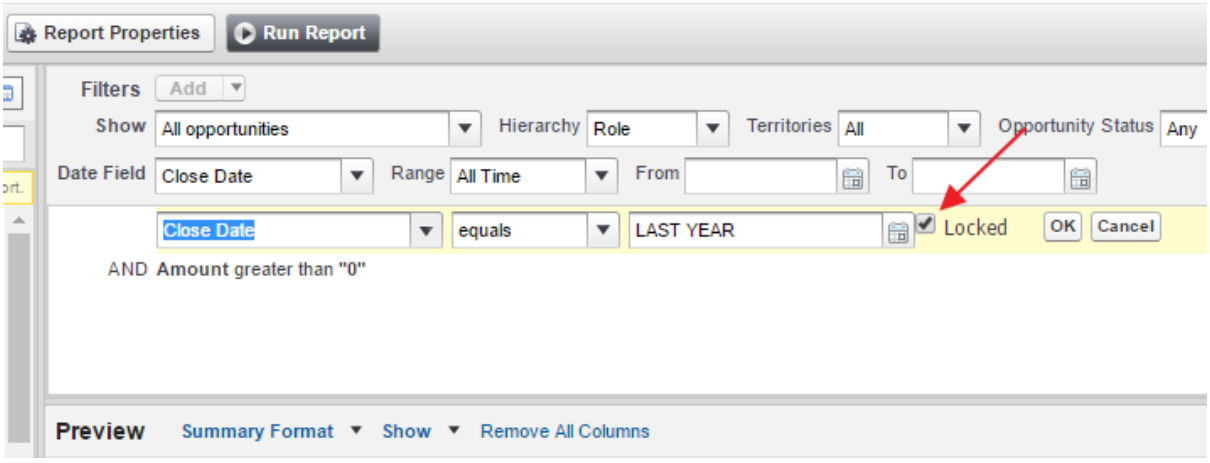
Show Me
All opportunities

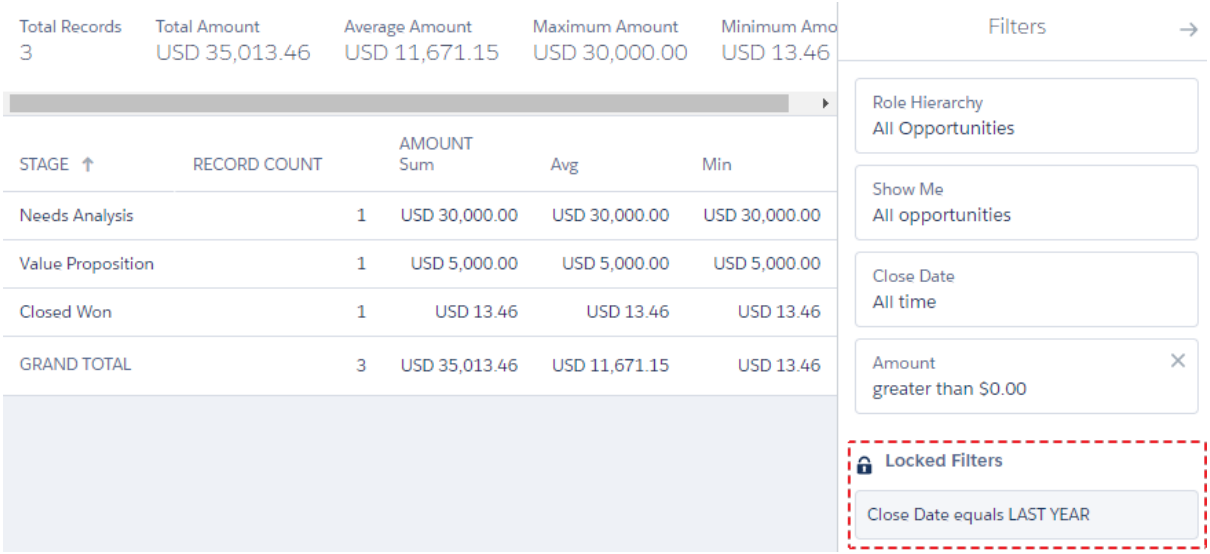
Close Date
All time

Locked Filters

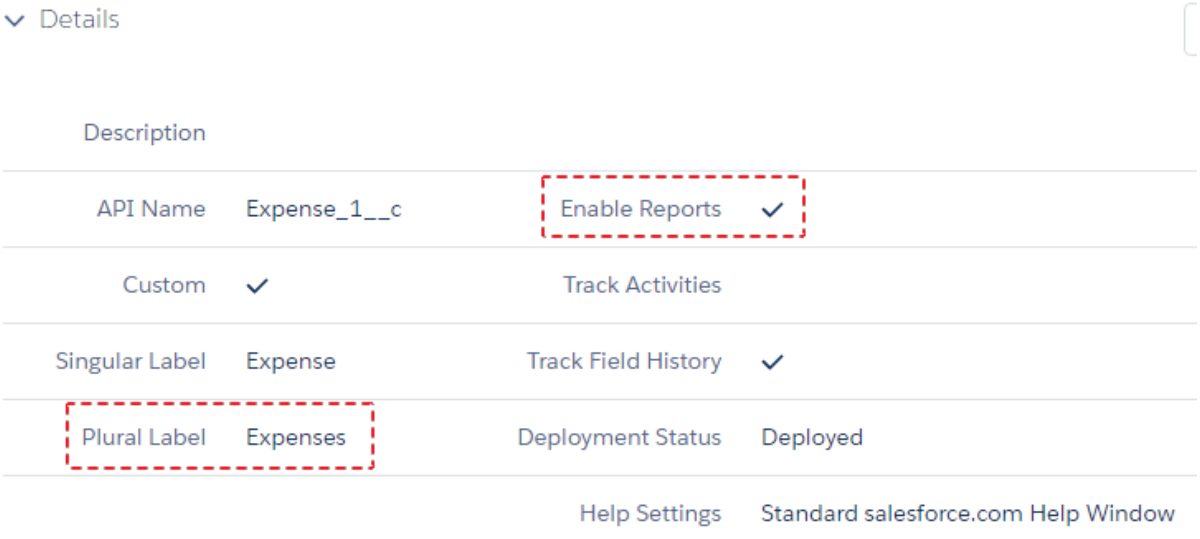
Close Date equals LAST YEAR

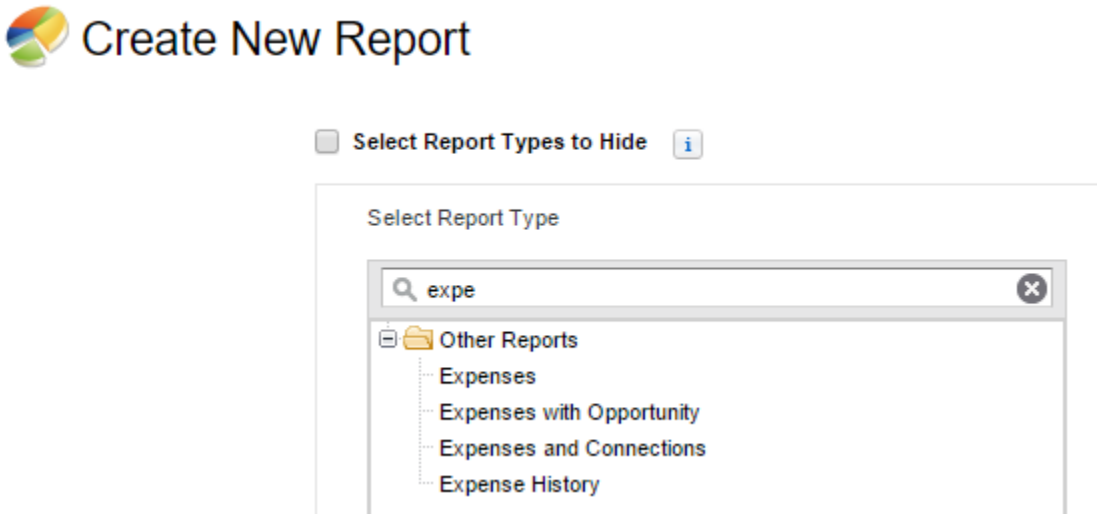

Total Records
5
Total Amount
USD 30,000.00
Average Amount
USD 6,000.00
Maximum Amount
USD 30,000.00
Minimum Amount
USD 0.00
Filters
Role Hierarchy
All Opportunities
Show Me
All opportunities
Close Date
All time
Locked Filters
Close Date equals LAST YEAR
Chart Filters
Stage equals Needs Analysis
Stage
Needs Analysis
Value Proposition
Closed Won
Closed Lost
44K
STAGE
RECORD COUNT
AMOUNT
Sum
Avg
Min
Max
Needs Analysis
5
USD 30,000.00
USD 6,000.00
USD 0.00
USD 30,000.00
GRAND TOTAL
5
USD 30,000.00
USD 6,000.00
USD 0.00
USD 30,000.00

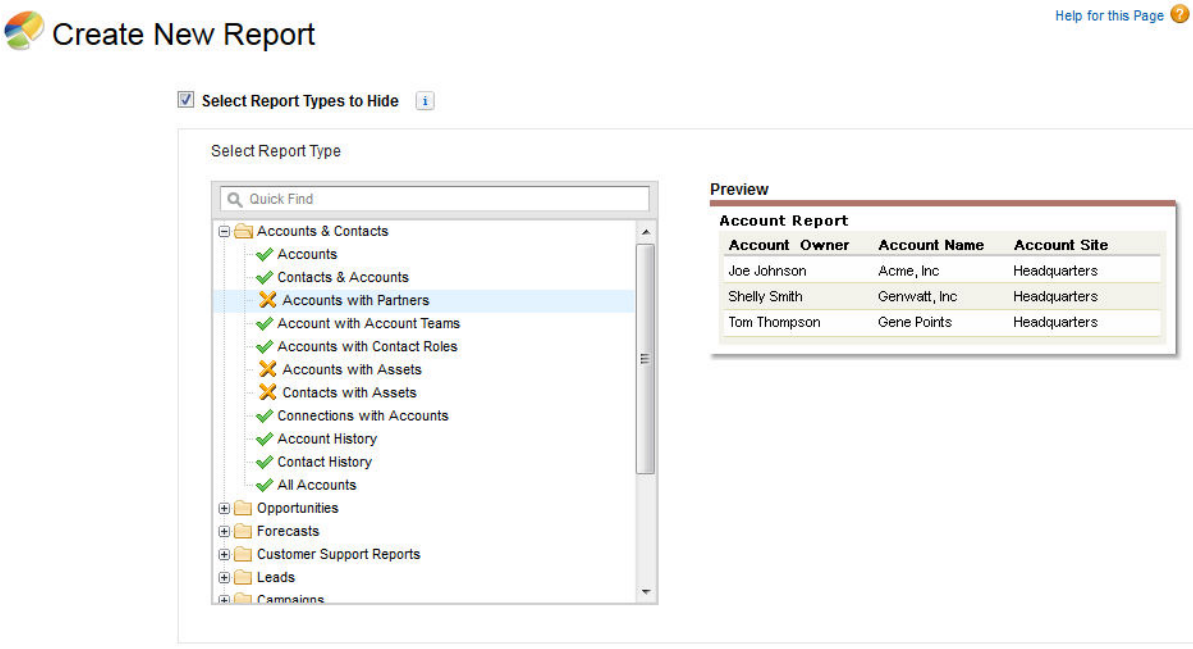

Report Properties
Run Report
Filters
Add
Show
All opportunities
Hierarchy
Role
Territories
All
Opportunity Status
Any
Date Field
Close Date
Range
All Time
From
To
Close Date
equals
LAST YEAR
Locked
OK
Cancel
AND Amount greater than "0"
Preview
Summary Format
Show
Remove All Columns

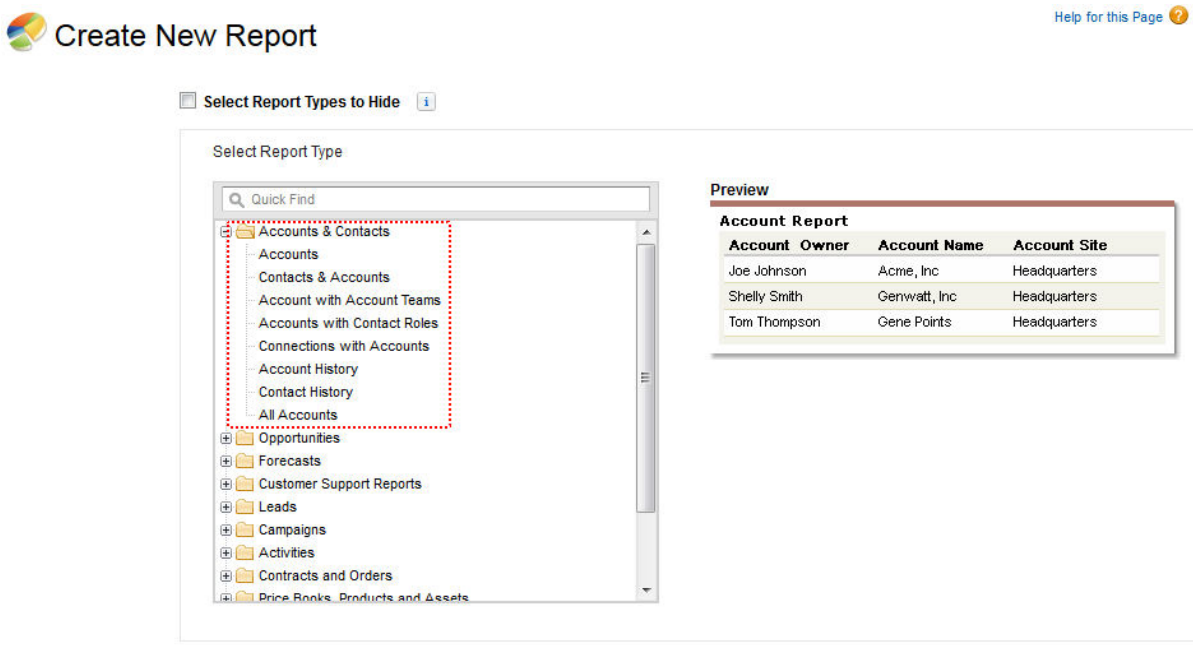

Total Records
3
Total Amount
USD 35,013.46
Average Amount
USD 11,671.15
Maximum Amount
USD 30,000.00
Minimum Amo
USD 13.46
STAGE
RECORD COUNT
AMOUNT
Sum
Avg
Min
Needs Analysis
1
USD 30,000.00
USD 30,000.00
USD 30,000.00
Value Proposition
1
USD 5,000.00
USD 5,000.00
USD 5,000.00
Closed Won
1
USD 13.46
USD 13.46
USD 13.46
GRAND TOTAL
3
USD 35,013.46
USD 11,671.15
USD 13.46
Filters
Role Hierarchy
All Opportunities
Show Me
All opportunities
Close Date
All time
Amount
greater than $0.00
Locked Filters
Close Date equals LAST YEAR

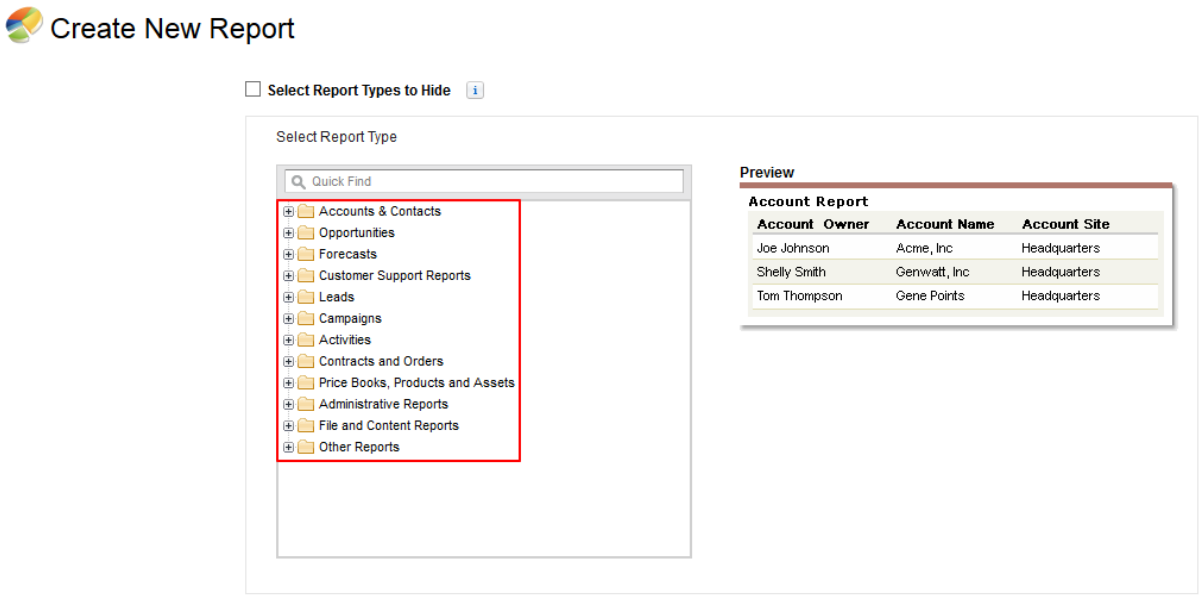
Chapter 5: Understanding Report Types

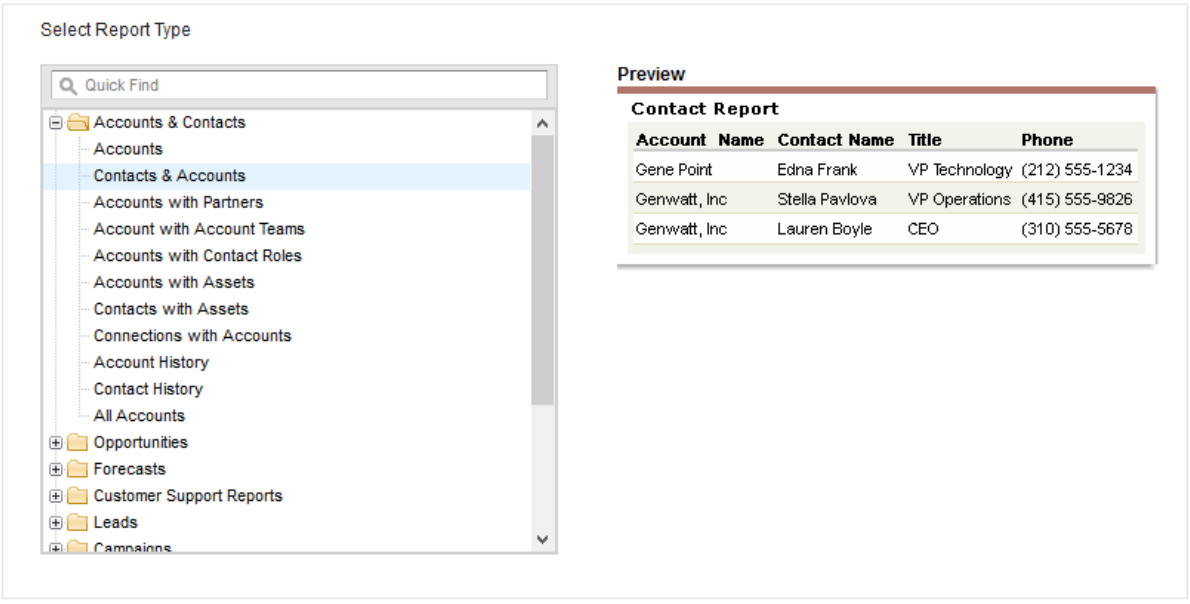


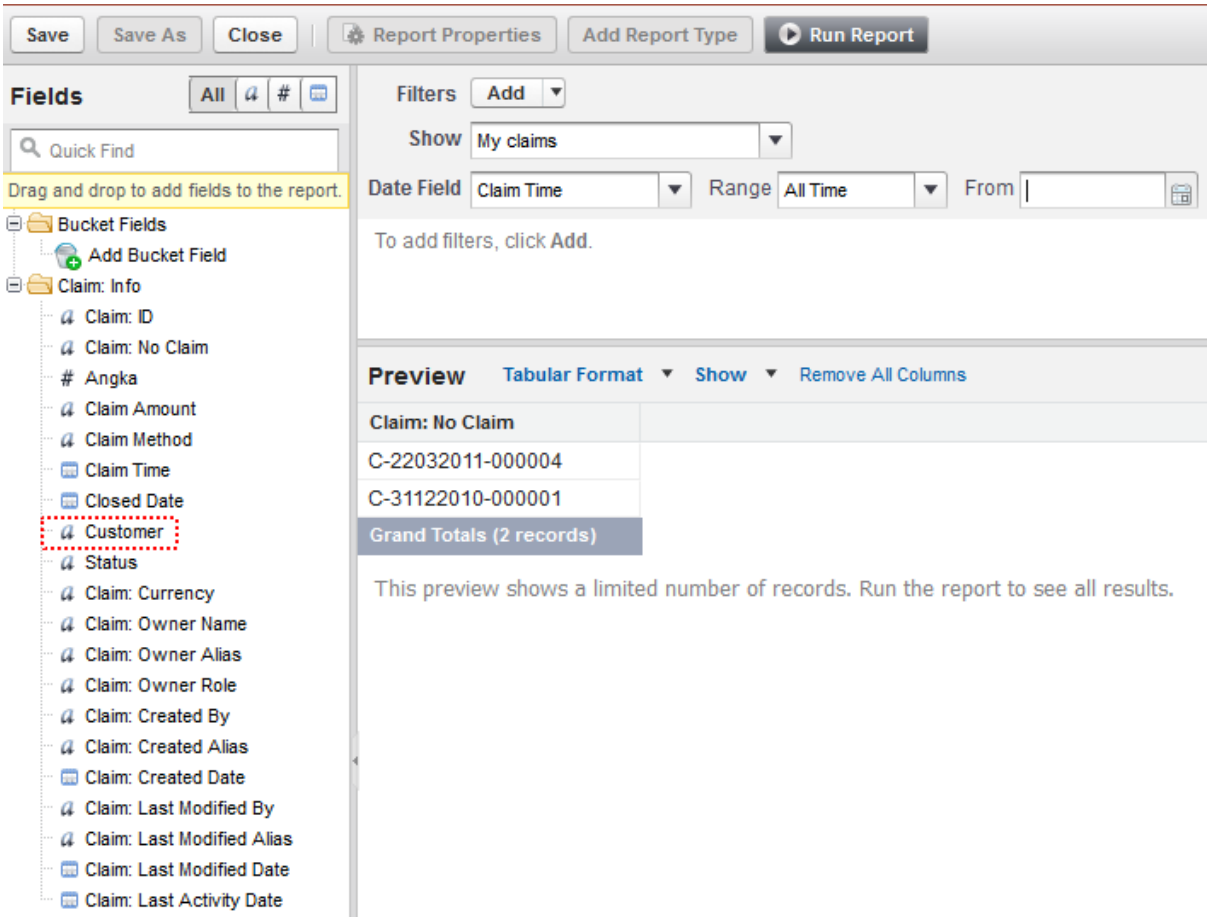


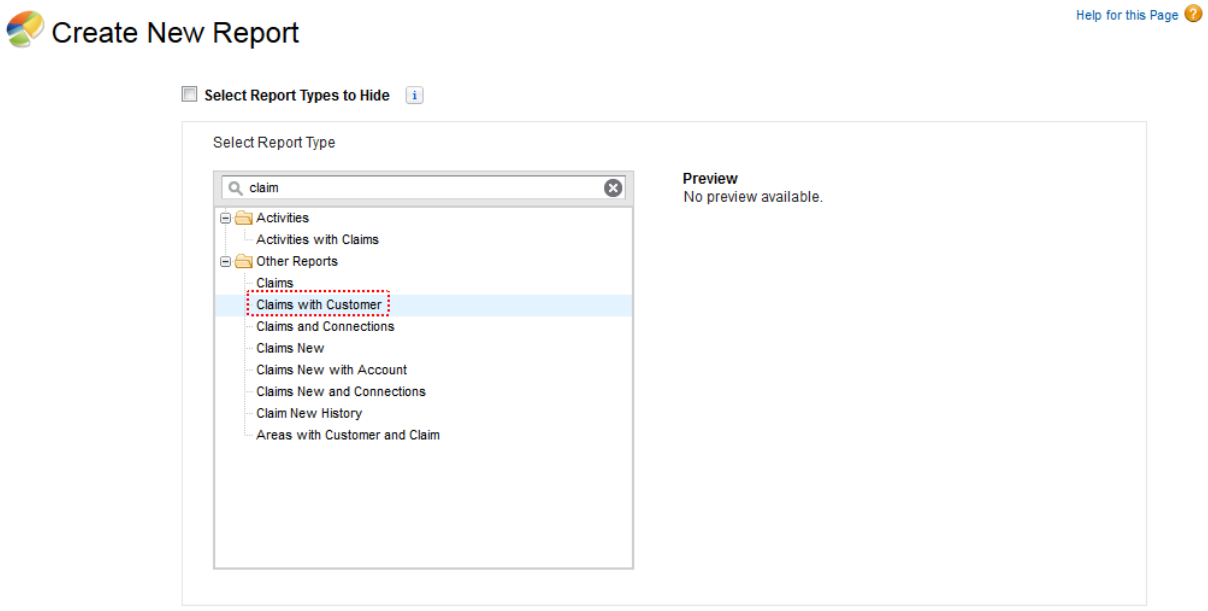

Create New Report
Help for this Page
Select Report Types to Hide
Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Accounts with Partners
Account with Account Teams
Accounts with Contact Roles
Accounts with Assets
Contacts with Assets
Connections with Accounts
Account History
Contact History
All Accounts
Opportunities
Forecasts
Customer Support Reports
Leads
Campaigns
Preview
Account Report
Account Owner
Account Name
Account Site
Joe Johnson
Acme, Inc
Headquarters
Shelly Smith
Genwatt, Inc
Headquarters
Tom Thompson
Gene Points
Headquarters

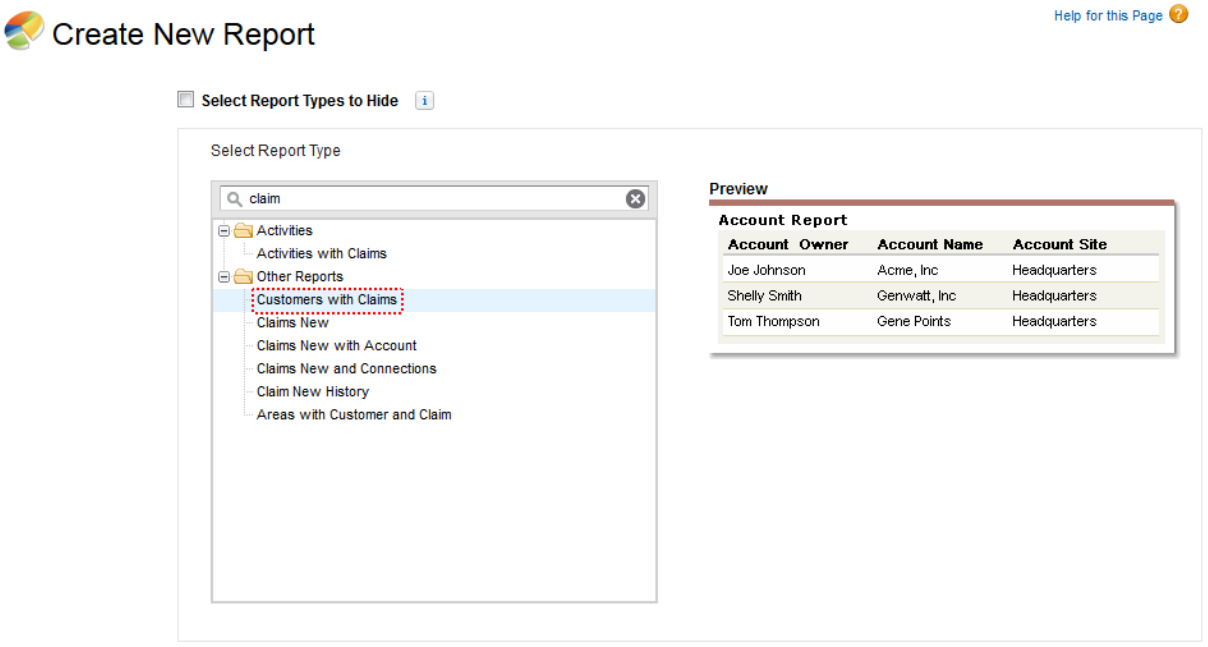

Create New Report
Help for this Page
Select Report Types to Hide
Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Account with Account Teams
Accounts with Contact Roles
Connections with Accounts
Account History
Contact History
All Accounts
Opportunities
Forecasts
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets
Preview
Account Report
Account Owner
Account Name
Account Site
Joe Johnson
Acme, Inc
Headquarters
Shelly Smith
Genwatt, Inc
Headquarters
Tom Thompson
Gene Points
Headquarters

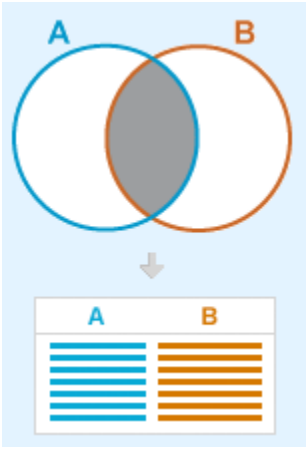

Create New Report
Select Report Types to Hide
Select Report Type
Quick Find
Accounts & Contacts
Opportunities
Forecasts
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets
Administrative Reports
File and Content Reports
Other Reports
Preview
Account Report
Account Owner
Account Name
Account Site
Joe Johnson
Acme, Inc
Headquarters
Shelly Smith
Genwatt, Inc
Headquarters
Tom Thompson
Gene Points
Headquarters

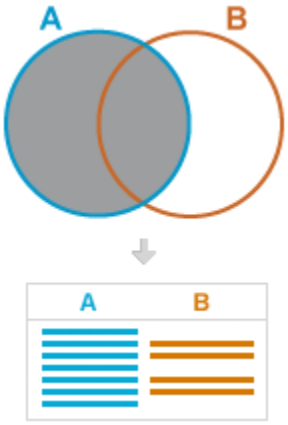

Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Accounts with Partners
Account with Account Teams
Accounts with Contact Roles
Accounts with Assets
Contacts with Assets
Connections with Accounts
Account History
Contact History
All Accounts
Opportunities
Forecasts
Customer Support Reports
Leads
Campaigns
Preview
Contact Report
Account Name
Contact Name
Title
Phone
Gene Point
Edna Frank
VP Technology
(212) 555-1234
Genwatt, Inc
Stella Pavlova
VP Operations
(415) 555-9826
Genwatt, Inc
Lauren Boyle
CEO
(310) 555-5678

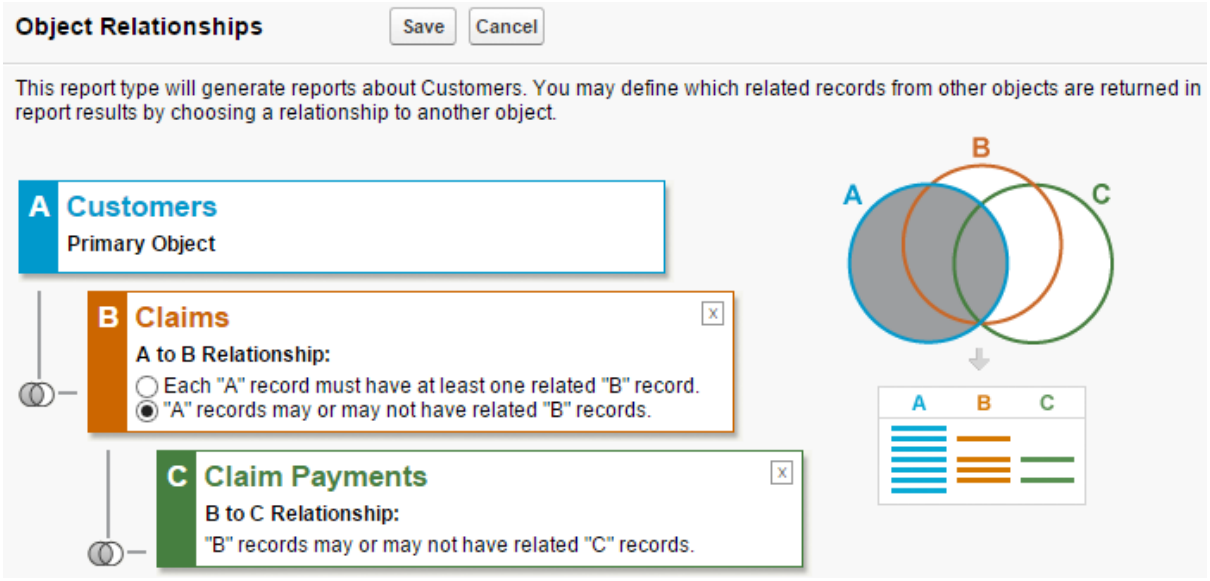

Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
Bucket Fields
Add Bucket Field
Claim: Info
Claim: ID
Claim: No Claim
Angka
Claim Amount
Claim Method
Claim Time
Closed Date
Customer
Status
Claim: Currency
Claim: Owner Name
Claim: Owner Alias
Claim: Owner Role
Claim: Created By
Claim: Created Alias
Claim: Created Date
Claim: Last Modified By
Claim: Last Modified Alias
Claim: Last Modified Date
Claim: Last Activity Date
Filters
Add
Show
My claims
Date Field
Claim Time
Range
All Time
From
To add filters, click Add.
Preview
Tabular Format
Show
Remove All Columns
Claim: No Claim
C-22032011-000004
C-31122010-000001
Grand Totals (2 records)
This preview shows a limited number of records. Run the report to see all results.


Create New Report
Help for this Page
Select Report Types to Hide
Select Report Type
claim
Activities
Activities with Claims
Other Reports
Claims
Claims with Customer
Claims and Connections
Claims New
Claims New with Account
Claims New and Connections
Claim New History
Areas with Customer and Claim
Preview
No preview available.


Create New Report
Help for this Page
Select Report Types to Hide
Select Report Type
claim
Activities
Activities with Claims
Other Reports
Customers with Claims
Claims New
Claims New with Account
Claims New and Connections
Claim New History
Areas with Customer and Claim
Preview
Account Report
Account Owner
Account Name
Account Site
Joe Johnson
Acme, Inc
Headquarters
Shelly Smith
Genwatt, Inc
Headquarters
Tom Thompson
Gene Points
Headquarters


A
B
A
B


A
B
A
B


Object Relationships
Save
Cancel
This report type will generate reports about Customers. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A
Customers
Primary Object
B
Claims
A to B Relationship:
Each "A" record must have at least one related "B" record.
"A" records may or may not have related "B" records.
C
Claim Payments
B to C Relationship:
"B" records may or may not have related "C" records.
A
B
C
A
B
C

Custom Report Type

Customers with/without Claims with/without Payment

Help for this Page

« Back to List: Custom Object Definitions

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

Edit | Delete | Clone

Report Type Label	Customers with/without Claims with/without Payment	Report Type Category	Other Reports
Report Type Name	Customers_with_without_Claims_with_without_Payment	Deployment Status	Deployed
Description	All customers with Claim information		
Created By	Johan Yu, 4/23/2017 9:37 PM	Modified By	Johan Yu, 4/23/2017 10:01 PM

Object Relationships

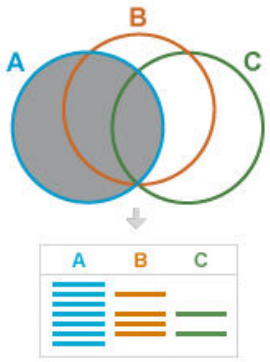
Edit

Object Relationships Help

Customers (A)

with or without related records from Claims (B)

with or without related records from Claim Payments (C)



Fields Available for Reports

Edit Layout | Preview Layout

Fields Available for Reports Help

Source	Selected Fields
Customers	8
Claims	9
Claim Payments	8

Add Fields Related to Claims Via Lookup

Newly added fields will appear inside layout section labeled "Claims".

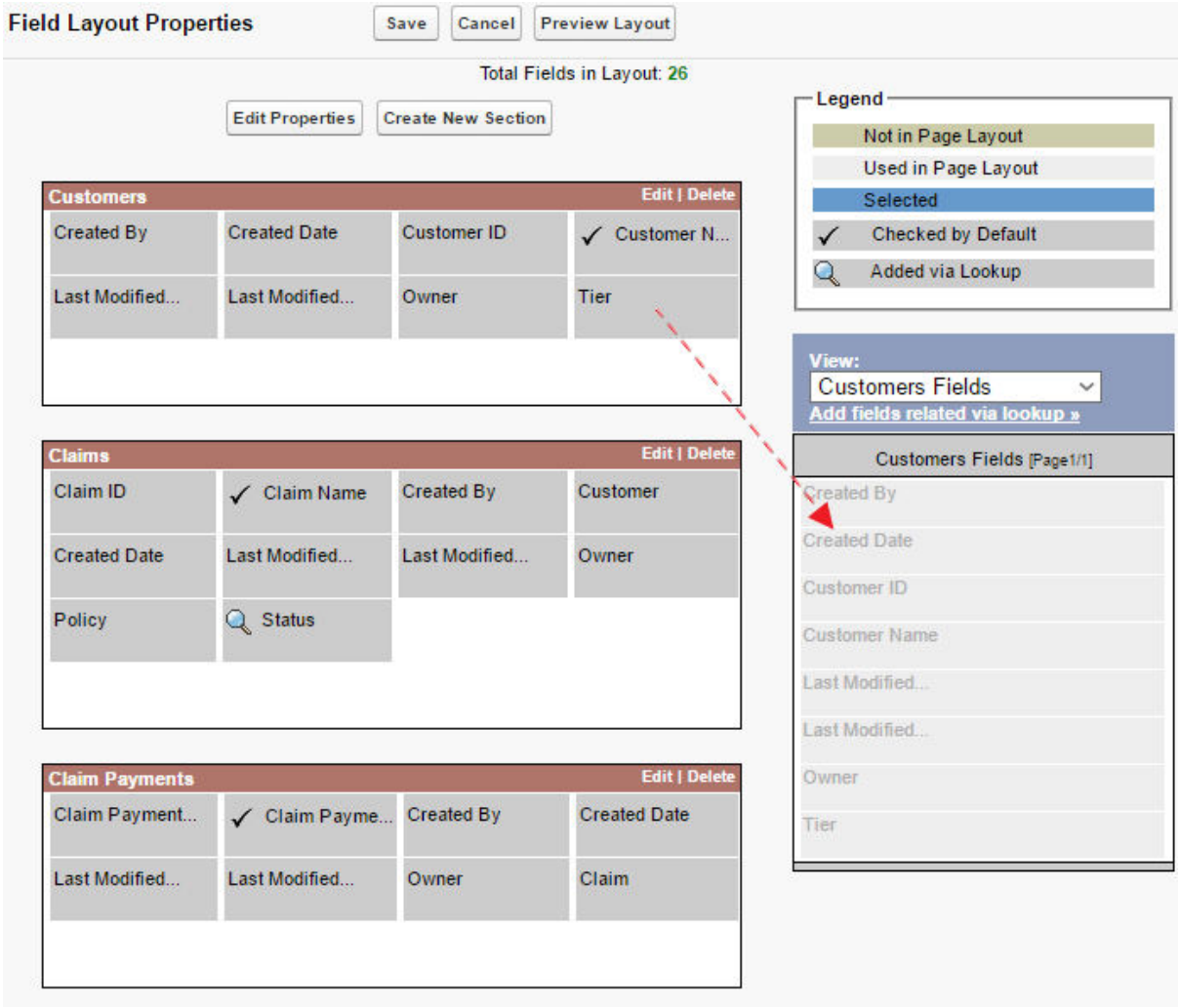
Select to add fields, or click a link to more fields:

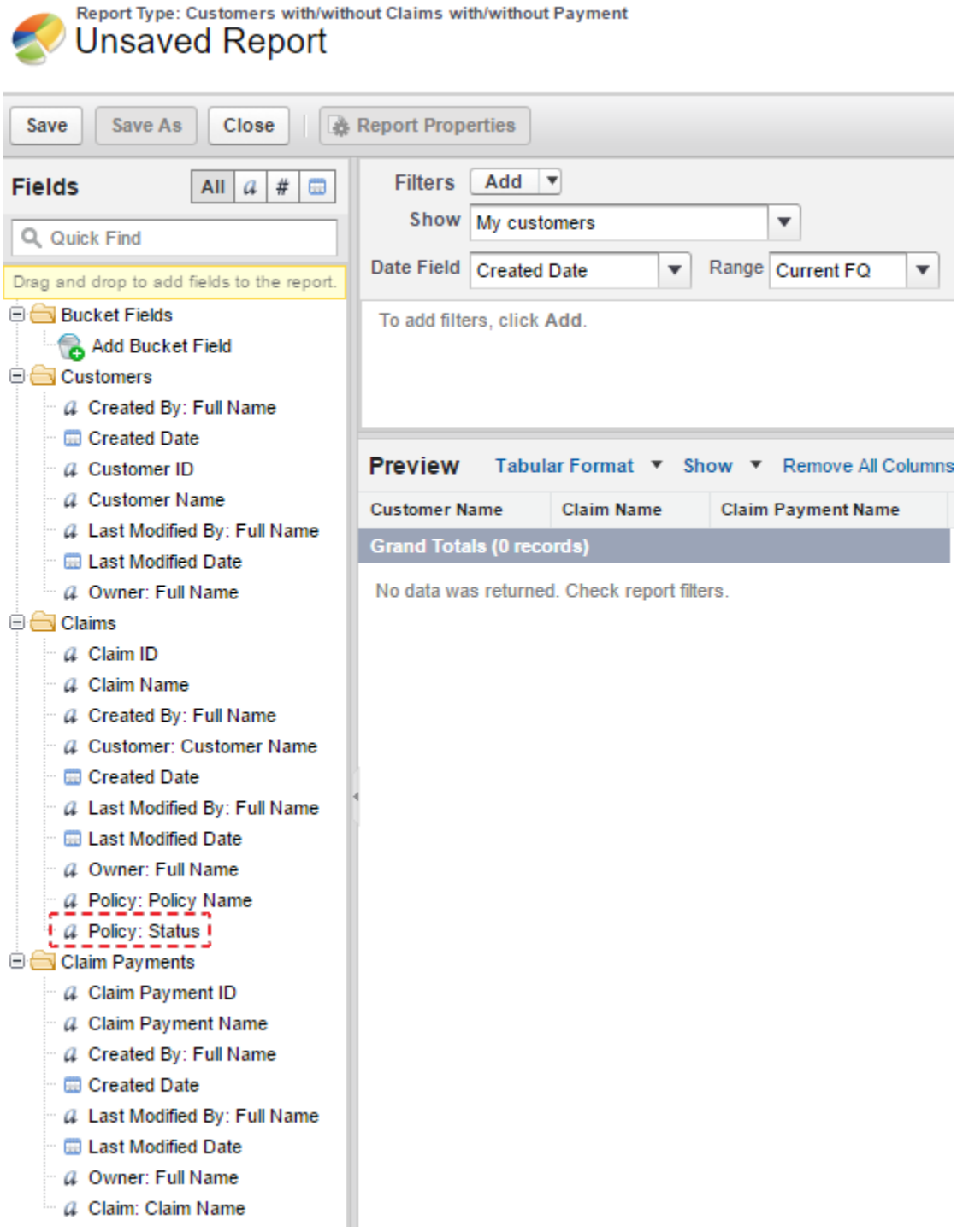
Path: Claims

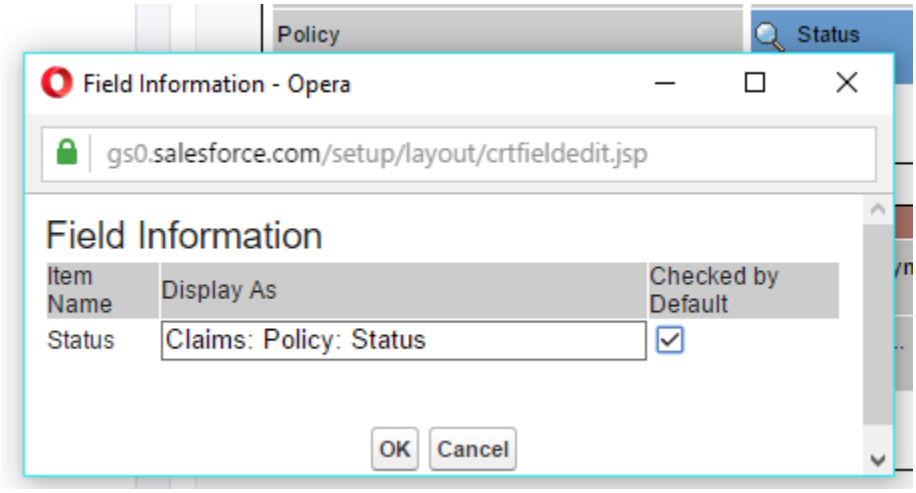
Created By »
Last Modified By »
Owner »
Policy »

Select All | Clear All

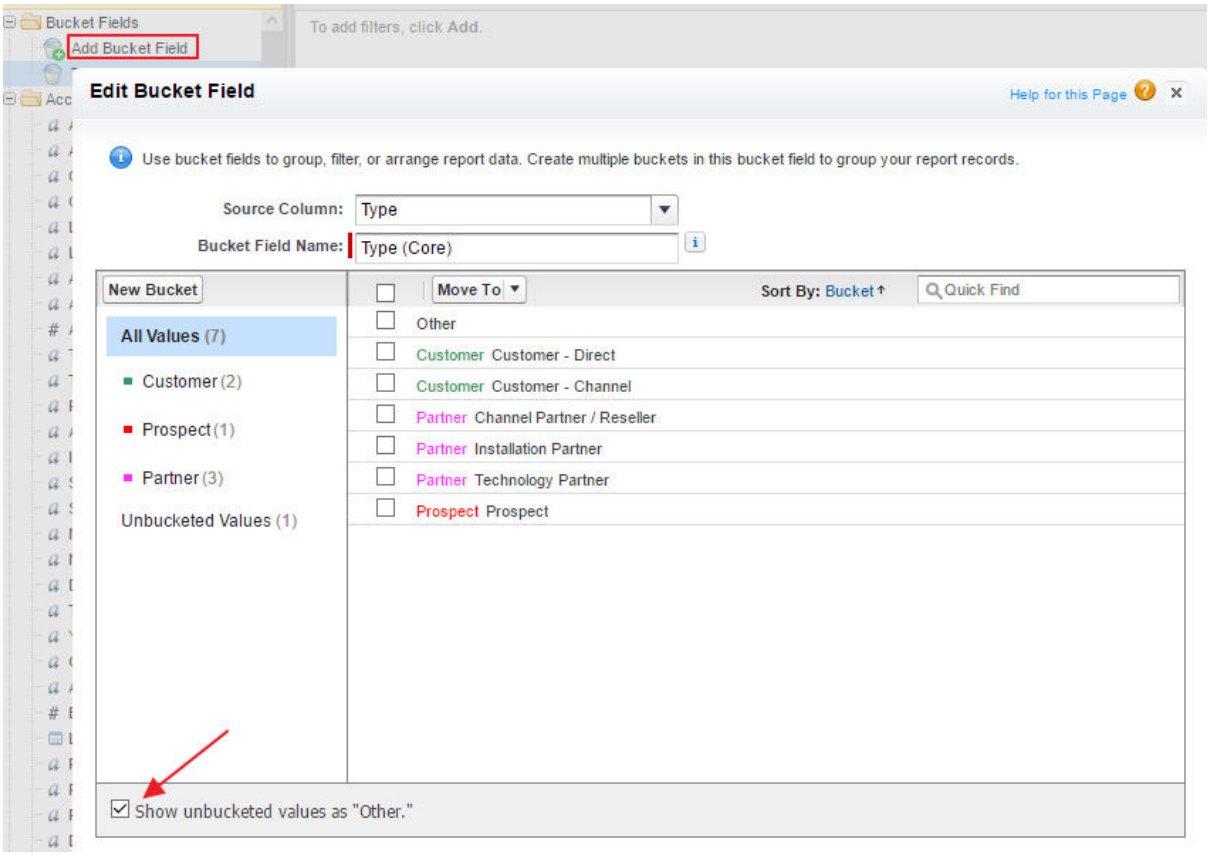
OK Cancel


Field Layout Properties
Save
Cancel
Preview Layout
Total Fields in Layout: 26
Edit Properties
Create New Section
Legend
Not in Page Layout
Used in Page Layout
Selected
Checked by Default
Added via Lookup
Customers
Edit | Delete
Created By
Created Date
Customer ID
Customer N...
Last Modified...
Last Modified...
Owner
Tier
Claims
Edit | Delete
Claim ID
Claim Name
Created By
Customer
Created Date
Last Modified...
Last Modified...
Owner
Policy
Status
Claim Payments
Edit | Delete
Claim Payment...
Claim Payme...
Created By
Created Date
Last Modified...
Last Modified...
Owner
Claim
View:
Customers Fields
Add fields related via lookup »
Customers Fields [Page 1/1]
Created By
Created Date
Customer ID
Customer Name
Last Modified...
Last Modified...
Owner
Tier

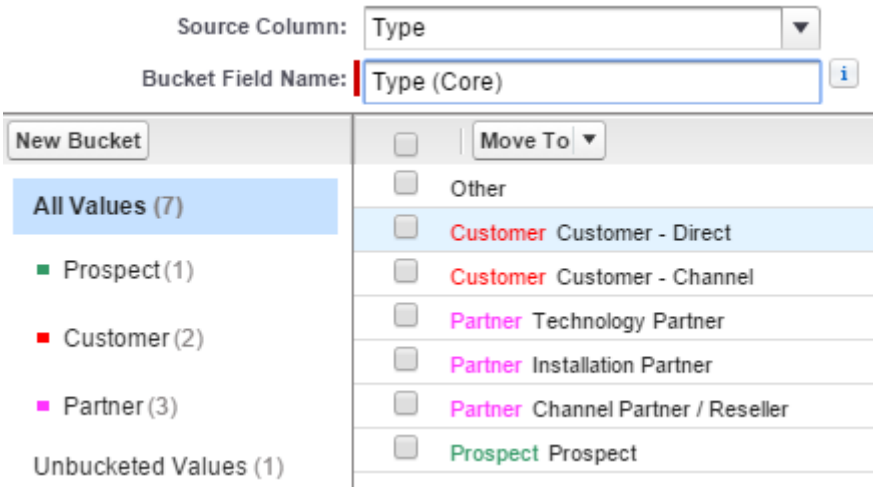

Report Type: Customers with/without Claims with/without Payment
Unsaved Report
Save
Save As
Close
Report Properties
Fields
All
Quick Find
Drag and drop to add fields to the report.
Bucket Fields
Add Bucket Field
Customers
Created By: Full Name
Created Date
Customer ID
Customer Name
Last Modified By: Full Name
Last Modified Date
Owner: Full Name
Claims
Claim ID
Claim Name
Created By: Full Name
Customer: Customer Name
Created Date
Last Modified By: Full Name
Last Modified Date
Owner: Full Name
Policy: Policy Name
Policy: Status
Claim Payments
Claim Payment ID
Claim Payment Name
Created By: Full Name
Created Date
Last Modified By: Full Name
Last Modified Date
Owner: Full Name
Claim: Claim Name
Filters
Add
Show
My customers
Date Field
Created Date
Range
Current FQ
To add filters, click Add.
Preview
Tabular Format
Show
Remove All Columns
Customer Name
Claim Name
Claim Payment Name
Grand Totals (0 records)
No data was returned. Check report filters.

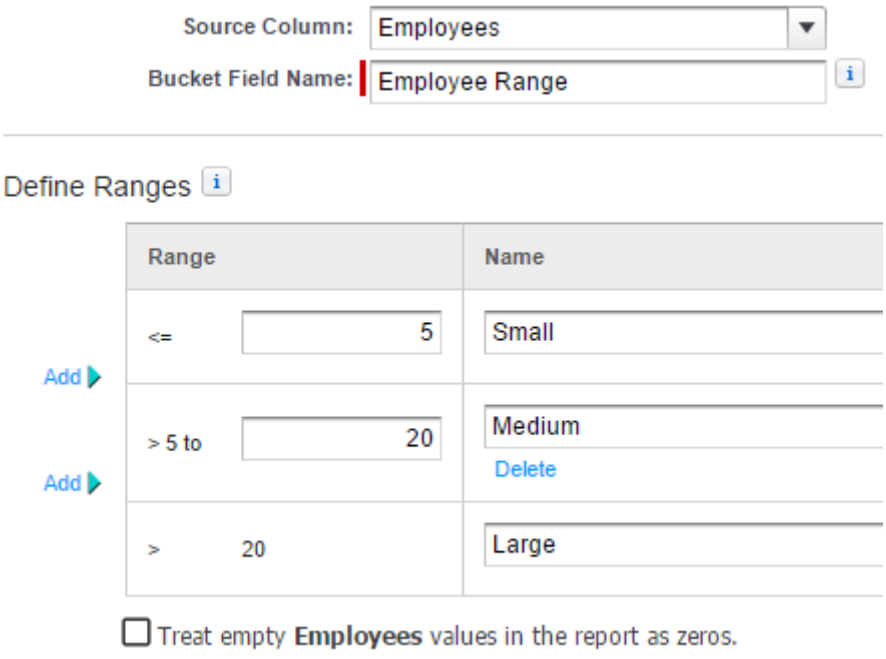

Policy
Status
Field Information - Opera
gs0.salesforce.com/setup/layout/crtfieldedit.jsp
Field Information
Item Name
Display As
Checked by Default
Status
Claims: Policy: Status
OK
Cancel

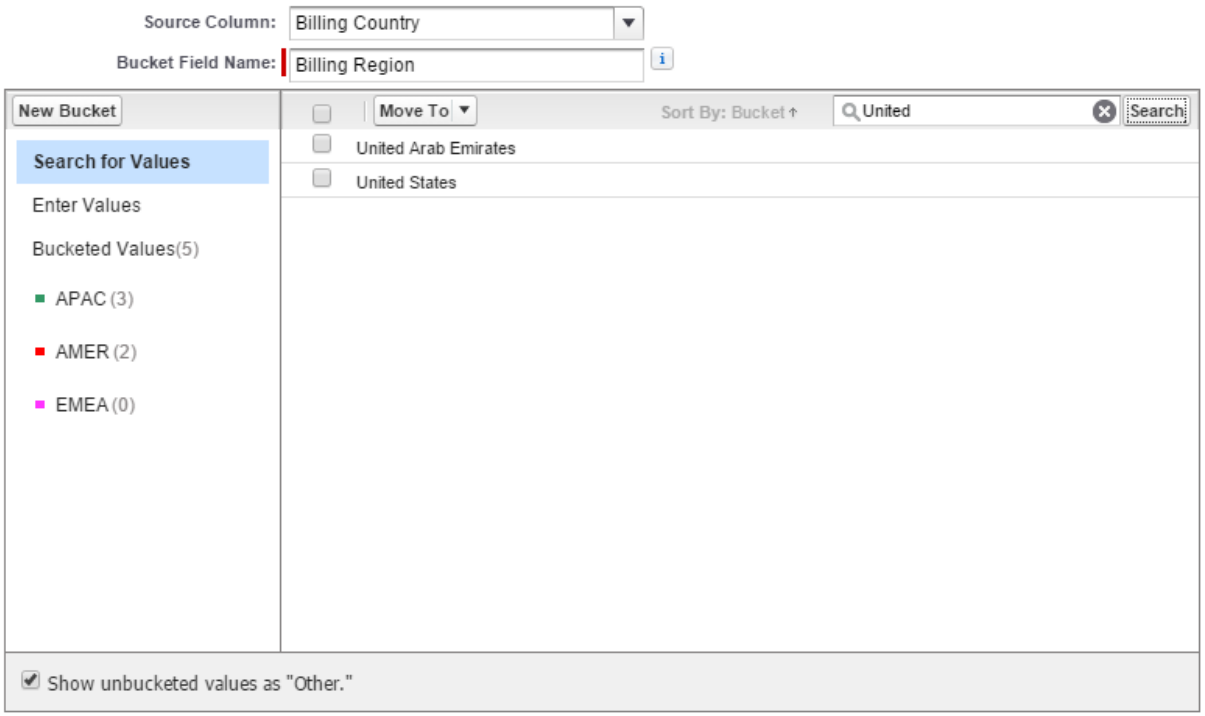
Chapter 6: Advanced Report Configuration

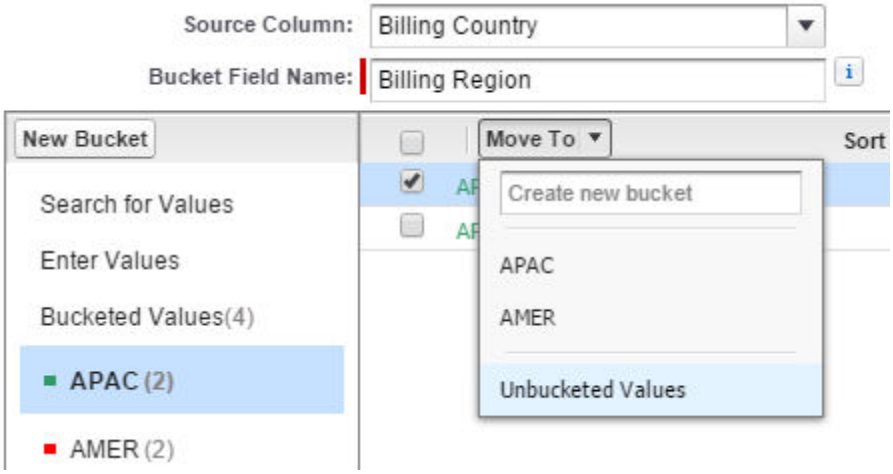


ACCOUNT NAME	ACCOUNT OWNER ↑	TYPE (CORE)
United Oil & Gas, UK	Alvin Lee	Customer
United Oil & Gas Corp.	Alvin Lee	Customer
Element Industry Ltd	Alvin Lee	Prospect
Accurate Glass	Alvin Lee	Customer
Mass-100	Alvin Lee	Other
PMA Manufacturing	Johan Yu	Prospect


Source Column: Type
Bucket Field Name: Type (Core)
New Bucket
Move To
All Values (7)
Prospect (1)
Customer (2)
Partner (3)
Unbucketed Values (1)
Other
Customer Customer - Direct
Customer Customer - Channel
Partner Technology Partner
Partner Installation Partner
Partner Channel Partner / Reseller
Prospect Prospect


Source Column: Employees
Bucket Field Name: Employee Range
Define Ranges
Range
Name
<= 5
Small
Add
> 5 to 20
Medium
Delete
Add
> 20
Large
Treat empty Employees values in the report as zeros.


Source Column:
Billing Country
Bucket Field Name:
Billing Region
New Bucket
Move To
Sort By: Bucket
United
Search
Search for Values
Enter Values
Bucketed Values(5)
APAC (3)
AMER (2)
EMEA (0)
United Arab Emirates
United States
Show unbucketed values as "Other."

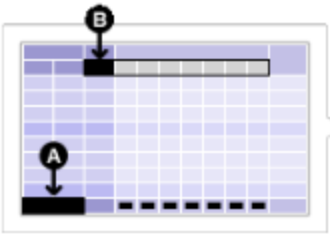

Source Column:
Billing Country
Bucket Field Name:
Billing Region
New Bucket
Move To
Sort
Search for Values
Enter Values
Bucketed Values(4)
APAC (2)
AMER (2)
Create new bucket
APAC
AMER
Unbucketed Values

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

- (•) All summary levels
- ( ) Grand summary only
- ( ) **Grouping 1**: Opportunity Owner
- ( ) └ **Grouping 2**: Type

Where will this formula be displayed?



This formula calculation will be displayed in the report at the level you select.

- ( ) At all summary levels
- (•) At a specific row/column **grouping level**...

A Row Grand Summary

B
- Row Grand Summary
- Opportunity Owner
- Closed

Formula Tips

Summary Fields ▼ Operators ▼ Check Syntax All ABS

Account Custom Field

Total Amount of Open Opportunities

Help for

Back to Account Fields

Custom Field Definition Detail

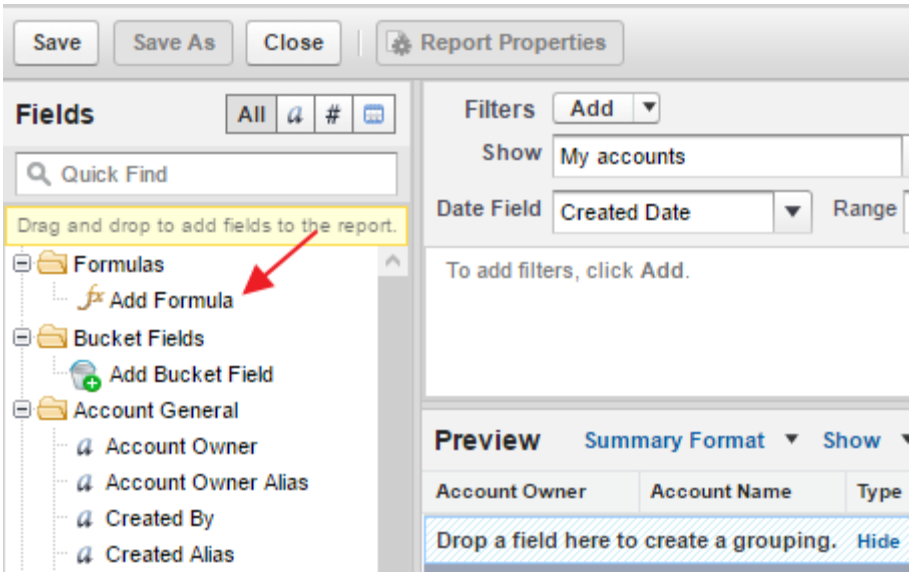
Edit | Set Field-Level Security | View Field Accessibility

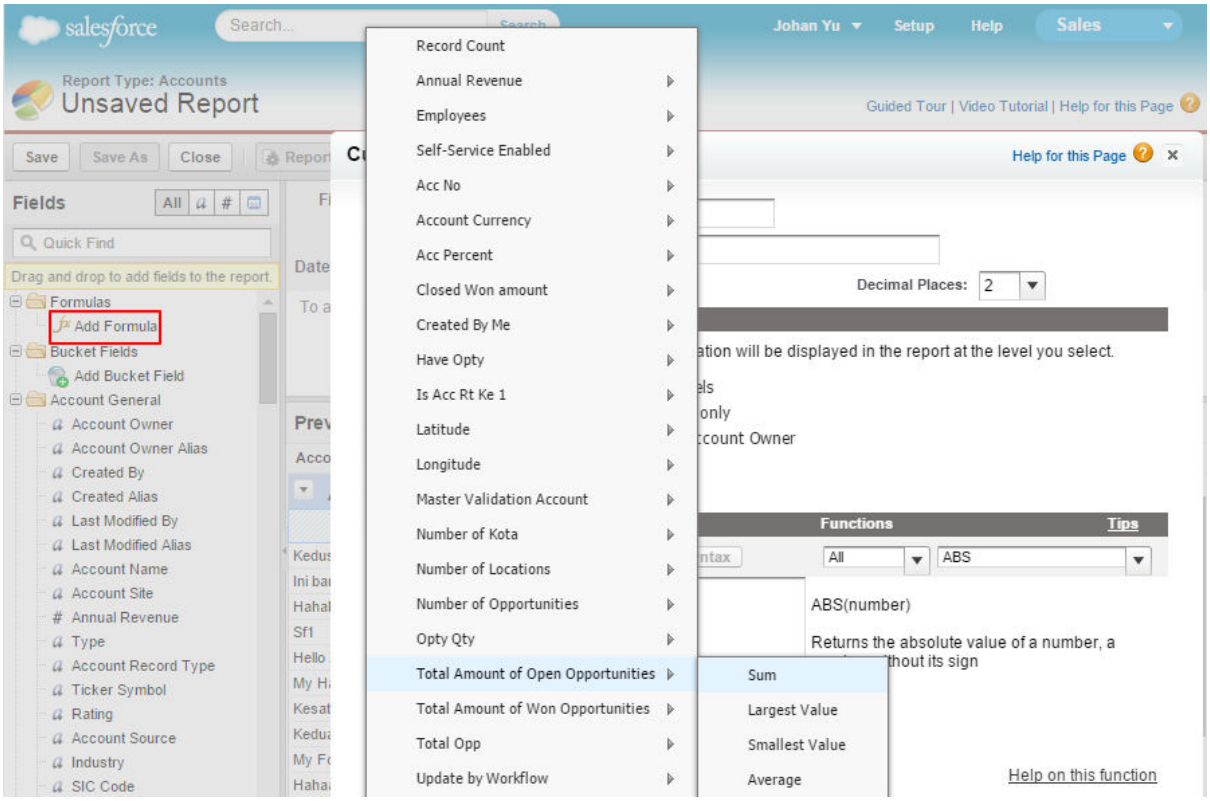
Field Information

Field Label	Total Amount of Open Opportunities	Object Name	Account
Field Name	Total_Amount_of_Open_Opportunities		
API Name	Total_Amount_of_Open_Opportunities__c		
Description			
Help Text			
Created By	Johan Yu, 4/28/2017 7:43 AM	Modified By	Johan Yu, 4/28/2017 7:48 AM

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Opportunity		
Field to Aggregate	Opportunity: Amount		
Filter Criteria	Closed EQUALS False		




salesforce
Search...
Johan Yu
Setup
Help
Sales
Report Type: Accounts
Unsaved Report
Guided Tour | Video Tutorial | Help for this Page
Save
Save As
Close
Help for this Page
Fields
All
Quick Find
Drag and drop to add fields to the report.
Formulas
Add Formula
Bucket Fields
Add Bucket Field
Account General
Account Owner
Account Owner Alias
Created By
Created Alias
Last Modified By
Last Modified Alias
Account Name
Account Site
Annual Revenue
Type
Account Record Type
Ticker Symbol
Rating
Account Source
Industry
SIC Code
Record Count
Annual Revenue
Employees
Self-Service Enabled
Acc No
Account Currency
Acc Percent
Closed Won amount
Created By Me
Have Opty
Is Acc Rt Ke 1
Latitude
Longitude
Master Validation Account
Number of Kota
Number of Locations
Number of Opportunities
Opty Qty
Total Amount of Open Opportunities
Total Amount of Won Opportunities
Total Opp
Update by Workflow
Sum
Largest Value
Smallest Value
Average
Decimal Places:
2
Functions
Tips
All
ABS
ABS(number)
Returns the absolute value of a number, a
Help on this function

REPORT
Open Opportunities

Total Records	Total Open Opportunities
17	$1,250,000.00

ACCOUNT OWNER	ACCOUNT NAME	TYPE	TOTAL OPEN OPPORTUNITIES
Alvin Lee (4 records)	Accurate Glass	Customer - Channel	
	Element Industry Ltd	Prospect	
	United Oil & Gas, UK	Customer - Direct	
	United Oil & Gas Corp.	Customer - Direct	
Subtotal			-
Johan Yu (13 records)	Burlington Textiles Corp of America	Customer - Direct	
	Dickenson plc	Customer - Channel	
	Edge Communications	Customer - Direct	
	Express Logistics and Transport	Customer - Channel	
	GenePoint	Customer - Channel	
	Grand Hotels & Resorts Ltd	Customer - Direct	
	King Inc	Customer - Direct	
	PMA Manufacturing	Prospect	
	Pyramid Construction Inc.	Customer - Channel	
	Quality Materials	Customer - Channel	
	Super Force Inc	Customer - Direct	
	United Oil & Gas, Singapore	Customer - Direct	
	University of Arizona	Customer - Direct	
Subtotal			-
GRAND TOTAL (17 RECORDS)			$1,250,000.00

Custom Summary Formula

Help for this Page

Column Name: Total Open Opportunities

Description: Total Amount of Open Opportunities

Format: Currency Decimal Places: 2

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

- (•) All summary levels
- ( ) Grand summary only
- ( ) **Grouping 1**: Account Owner

REPORT
Open Opportunities

Total Records	Total Open Opportunities
17	$1,250,000.00

ACCOUNT OWNER	ACCOUNT NAME	TYPE	TOTAL OPEN OPPORTUNITIES
Alvin Lee (4 records)	Accurate Glass	Customer - Channel	
	Element Industry Ltd	Prospect	
	United Oil & Gas, UK	Customer - Direct	
	United Oil & Gas Corp.	Customer - Direct	
Subtotal			$395,000.00
Johan Yu (13 records)	Burlington Textiles Corp of America	Customer - Direct	
	Dickenson plc	Customer - Channel	
	Edge Communications	Customer - Direct	
	Express Logistics and Transport	Customer - Channel	
	GenePoint	Customer - Channel	
	Grand Hotels & Resorts Ltd	Customer - Direct	
	King Inc	Customer - Direct	
	PMA Manufacturing	Prospect	
	Pyramid Construction Inc.	Customer - Channel	
	Quality Materials	Customer - Channel	
	Super Force Inc	Customer - Direct	
	United Oil & Gas, Singapore	Customer - Direct	
	University of Arizona	Customer - Direct	
Subtotal			$855,000.00
GRAND TOTAL (17 RECORDS)			$1,250,000.00

REPORT
Open Opportunities

Total Records	Total Total Amount of Open Opportunities	Total Open Opportunities
17	$1,250,000.00	$1,250,000.00

ACCOUNT OWNER	ACCOUNT NAME	TYPE	TOTAL AMOUNT OF OPEN OPPORTUNITIES Sum	TOTAL OPEN OPPORTUNITIES
Alvin Lee (4 records)	Accurate Glass	Customer - Channel	$0.00	
	Element Industry Ltd	Prospect	$0.00	
	United Oil & Gas, UK	Customer - Direct	$0.00	
	United Oil & Gas Corp.	Customer - Direct	$395,000.00	
Subtotal			$395,000.00	$395,000.00
Johan Yu (13 records)	Burlington Textiles Corp of America	Customer - Direct	$0.00	
	Dickenson plc	Customer - Channel	$15,000.00	
	Edge Communications	Customer - Direct	$35,000.00	
	Express Logistics and Transport	Customer - Channel	$200,000.00	
	GenePoint	Customer - Channel	$60,000.00	
	Grand Hotels & Resorts Ltd	Customer - Direct	$265,000.00	
	King Inc	Customer - Direct	$0.00	
	PMA Manufacturing	Prospect	$0.00	
	Pyramid Construction Inc.	Customer - Channel	$100,000.00	
	Quality Materials	Customer - Channel	$0.00	
	Super Force Inc	Customer - Direct	$80,000.00	
	United Oil & Gas, Singapore	Customer - Direct	$0.00	
	University of Arizona	Customer - Direct	$100,000.00	
Subtotal			$855,000.00	$855,000.00
GRAND TOTAL (17 RECORDS)			$1,250,000.00	$1,250,000.00

Account Custom Field

Total Amount of Opportunities

Help for this Page

Back to Account Fields

Custom Field Definition Detail

Edit | Set Field-Level Security | View Field Accessibility

Field Information

Field Label	Total Amount of Opportunities	Object Name	Account
Field Name	Total_Amount_of_Opportunities		
API Name	Total_Amount_of_Opportunities__c		
Description			
Help Text			
Created By	Johan Yu, 4/29/2017 9:40 PM	Modified By	Johan Yu, 4/29/2017 9:40 PM

Roll-Up Summary Options

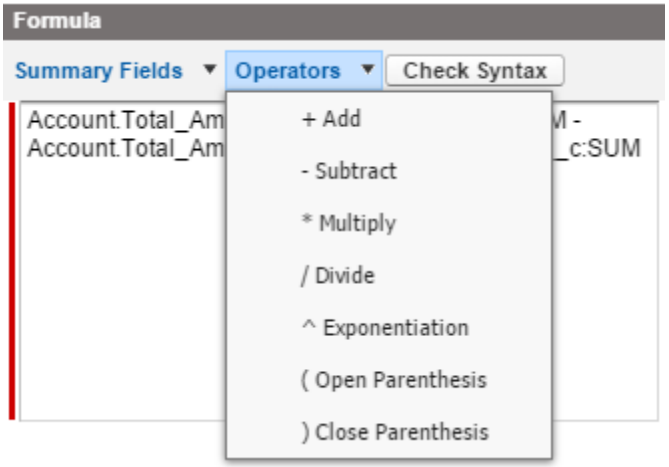
Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Opportunity		
Field to Aggregate	Opportunity: Amount		
Filter Criteria			

REPORT

Closed Opportunities

Total Records	Total Total Amount of Opportunities	Total Total Amount of Open Opportunities	Total Closed Opportunities
17	$6,086,000.00	$1,250,000.00	$4,836,000.00

ACCOUNT OWNER	RECORD COUNT	TOTAL AMOUNT OF OPPORTUNITIES Sum	TOTAL AMOUNT OF OPEN OPPORTUNITIES Sum	TOTAL CLOSED OPPORTUNITIES
Alvin Lee	4	$3,511,000.00	$395,000.00	$3,116,000.00
Johan Yu	13	$2,575,000.00	$855,000.00	$1,720,000.00
GRAND TOTAL	17	$6,086,000.00	$1,250,000.00	$4,836,000.00



REPORT

Opportunity Check Count

Total Records	Check Count
9	5

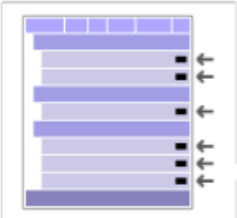
OPPORTUNITY OWNER	OPPORTUNITY NAME	STAGE	AMOUNT	CHECK COUNT
Alvin Lee (4 records)	United Oil Installations	Negotiation/Review	$270,000.00	
	United Oil Office Portable Generators	Negotiation/Review	$125,000.00	
	United Oil Plant Standby Generators	Closed Won	$675,000.00	
	United Oil Refinery Generators	Closed Lost	$270,000.00	
Subtotal				2
Johan Yu (5 records)	Edge Emergency Generator	Id. Decision Makers	$35,000.00	
	Edge Installation	Closed Won	$50,000.00	
	Edge SLA	Closed Won	$60,000.00	
	Project Motor Head	Closed Won	$100,000.00	
	Project Motor Links in Kentica	Closed Won	$75,000.00	
Subtotal				4
GRAND TOTAL (9 RECORDS)				5

REPORT
Opportunity Max

Total Records	Total Amount	Total Projected Revenue
9	$1,660,000.00	$1,530,000.00

OPPORTUNITY OWNER	OPPORTUNITY NAME	AMOUNT Sum	PROJECTED REVENUE Sum	MAX AMOUNT
Alvin Lee (4 records)	United Oil Installations	$270,000.00	$275,000.00	
	United Oil Office Portable Generators	$125,000.00	$120,000.00	
	United Oil Plant Standby Generators	$675,000.00	$500,000.00	
	United Oil Refinery Generators	$270,000.00	$300,000.00	
Subtotal		$1,340,000.00	$1,195,000.00	1,340,000
Johan Yu (5 records)	Edge Emergency Generator	$35,000.00	$40,000.00	
	Edge Installation	$50,000.00	$50,000.00	
	Edge SLA	$60,000.00	$65,000.00	
	Project Motor Head	$100,000.00	$110,000.00	
	Project Motor Links in Kentica	$75,000.00	$70,000.00	
Subtotal		$320,000.00	$335,000.00	335,000
GRAND TOTAL (9 RECORDS)		$1,660,000.00	$1,530,000.00	-

Where will this formula be displayed?



This formula calculation will be displayed in the report at the level you select.

- ○ All summary levels
- ○ Grand summary only
- ○ **Grouping 1**: Opportunity Owner
- ◉ └ **Grouping 2**: Type

Formula | **Functions** | **Tips**

Summary Fields ▾ Operators ▾ Check Syntax

All ▾ PARENTGROUPVAL ▾

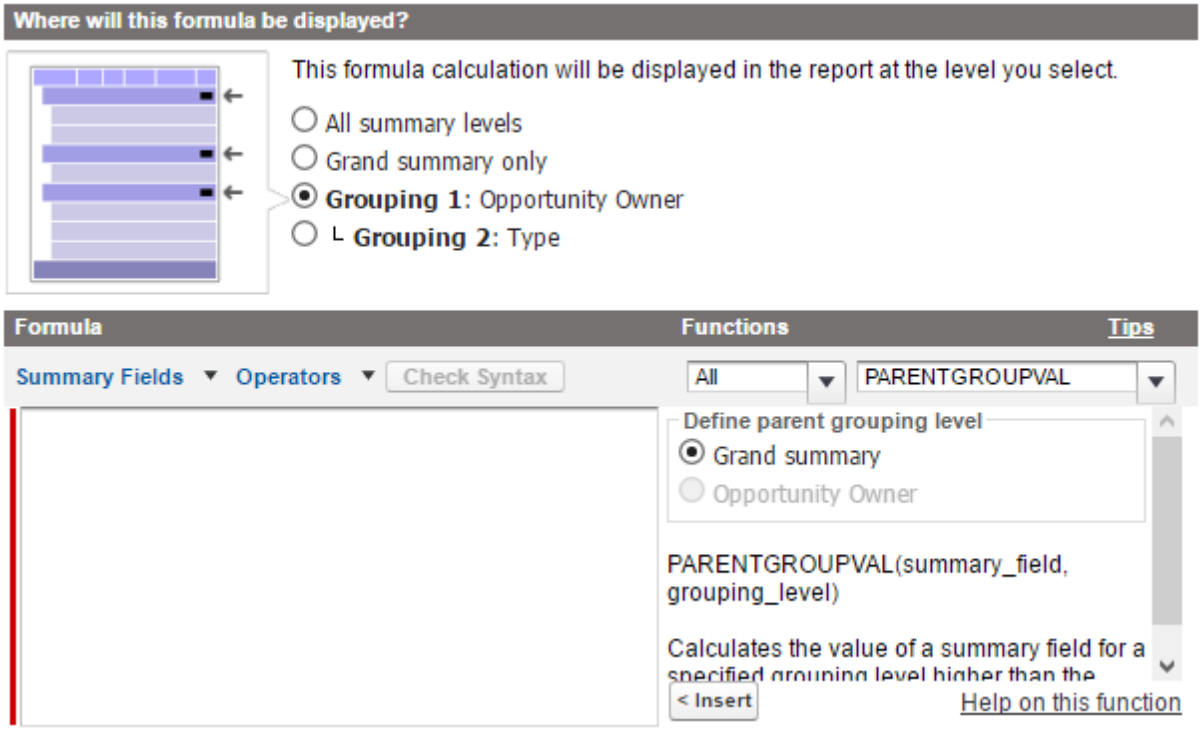
Define parent grouping level

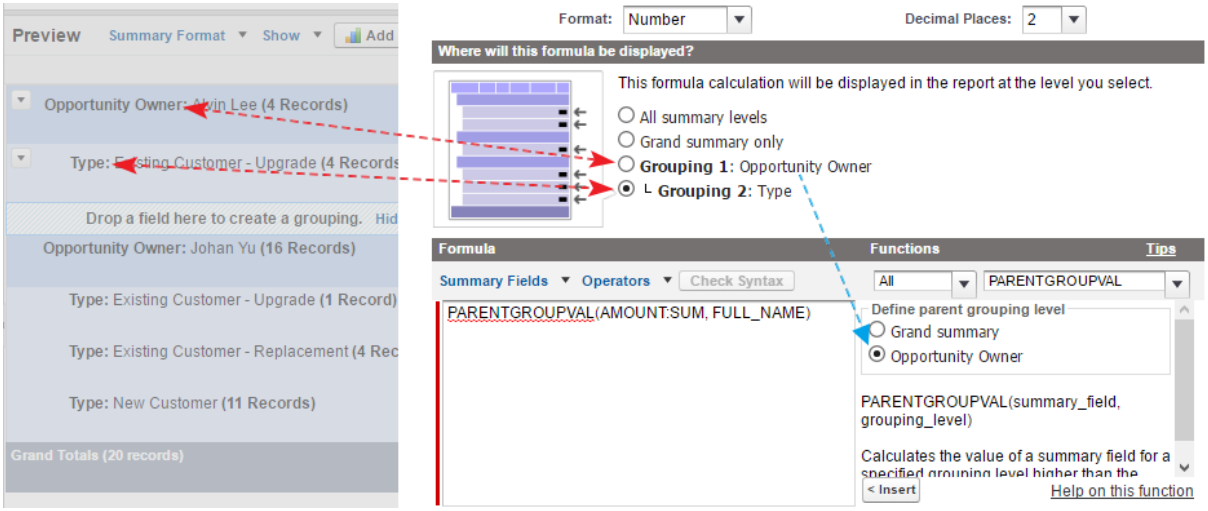
- ○ Grand summary
- ◉ Opportunity Owner

PARENTGROUPVAL(summary_field, grouping_level)

Calculates the value of a summary field for a specified grouping level higher than the

< Insert Help on this function


Where will this formula be displayed?
This formula calculation will be displayed in the report at the level you select.
All summary levels
Grand summary only
Grouping 1: Opportunity Owner
└ Grouping 2: Type
Formula
Functions
Tips
Summary Fields
Operators
Check Syntax
All
PARENTGROUPVAL
Define parent grouping level
Grand summary
Opportunity Owner
PARENTGROUPVAL(summary_field, grouping_level)
Calculates the value of a summary field for a
< Insert
Help on this function


Preview
Summary Format
Show
Add
Opportunity Owner: Alvin Lee (4 Records)
Type: Existing Customer - Upgrade (4 Records
Drop a field here to create a grouping.
Opportunity Owner: Johan Yu (16 Records)
Type: Existing Customer - Upgrade (1 Record)
Type: Existing Customer - Replacement (4 Rec
Type: New Customer (11 Records)
Grand Totals (20 records)
Format:
Number
Decimal Places:
2
Where will this formula be displayed?
This formula calculation will be displayed in the report at the level you select.
All summary levels
Grand summary only
Grouping 1: Opportunity Owner
└ Grouping 2: Type
Formula
Functions
Tips
Summary Fields
Operators
Check Syntax
All
PARENTGROUPVAL
PARENTGROUPVAL(AMOUNT:SUM, FULL_NAME)
Define parent grouping level
Grand summary
Opportunity Owner
PARENTGROUPVAL(summary_field, grouping_level)
Calculates the value of a summary field for a
< Insert
Help on this function

CLOSE DATE	OPPORTUNITY OWNER	OPPORTUNITY NAME	AMOUNT Sum	AMOUNT BY CLOSE DATE
June 2016 (3 records)	Alvin Lee (1 record)	Pyramid Emergency Generators	$100,000.00	
	Subtotal		$100,000.00	$265,000
	Johan Yu (2 records)	Element Stage 1A	$85,000.00	
		Element Stage 1B	$80,000.00	
	Subtotal		$165,000.00	$265,000
Subtotal			$265,000.00	-
July 2016 (3 records)	Alvin Lee (1 record)	Element Phase IIa	$38,000.00	
	Subtotal		$38,000.00	$213,000
	Johan Yu (2 records)	Project Motor Head	$100,000.00	
		Project Motor Links in Kentica	$75,000.00	
	Subtotal		$175,000.00	$213,000
Subtotal			$213,000.00	-
GRAND TOTAL (6 RECORDS)			$478,000.00	-

CLOSE DATE	OPPORTUNITY OWNER	OPPORTUNITY NAME	AMOUNT Sum	AMOUNT BY CLOSE DATE	AMOUNT BY GRAND TOTAL
June 2016 (3 records)	Alvin Lee (1 record)	Pyramid Emergency Generators	$100,000.00		
	Subtotal		$100,000.00	$265,000	$478,000.00
	Johan Yu (2 records)	Element Stage 1A	$85,000.00		
		Element Stage 1B	$80,000.00		
	Subtotal		$165,000.00	$265,000	$478,000.00
Subtotal			$265,000.00	-	-
July 2016 (3 records)	Alvin Lee (1 record)	Element Phase IIa	$38,000.00		
	Subtotal		$38,000.00	$213,000	$478,000.00
	Johan Yu (2 records)	Project Motor Head	$100,000.00		
		Project Motor Links in Kentica	$75,000.00		
	Subtotal		$175,000.00	$213,000	$478,000.00
Subtotal			$213,000.00	-	-
GRAND TOTAL (6 RECORDS)			$478,000.00	-	-

CLOSE DATE	OPPORTUNITY OWNER	OPPORTUNITY NAME	AMOUNT Sum	AMOUNT BY CLOSE DATE	AMOUNT BY GRAND TOTAL
June 2016 (3 records)	Alvin Lee (1 record)	Pyramid Emergency Generators	$100,000.00		
	Subtotal		$100,000.00	$265,000	-
	Johan Yu (2 records)	Element Stage 1A	$85,000.00		
		Element Stage 1B	$80,000.00		
	Subtotal		$165,000.00	$265,000	-
Subtotal			$265,000.00	-	$478,000.00
July 2016 (3 records)	Alvin Lee (1 record)	Element Phase IIa	$38,000.00		
	Subtotal		$38,000.00	$213,000	-
	Johan Yu (2 records)	Project Motor Head	$100,000.00		
		Project Motor Links in Kentica	$75,000.00		
	Subtotal		$175,000.00	$213,000	-
Subtotal			$213,000.00	-	$478,000.00
GRAND TOTAL (6 RECORDS)			$478,000.00	-	-

CLOSE DATE	OPPORTUNITY OWNER	RECORD COUNT	AMOUNT Sum	% OF TOTAL
June 2016	Alvin Lee	1	$100,000.00	-
	Johan Yu	2	$165,000.00	-
Subtotal		3	$265,000.00	55.44%
July 2016	Alvin Lee	1	$38,000.00	-
	Johan Yu	2	$175,000.00	-
Subtotal		3	$213,000.00	44.56%
GRAND TOTAL		6	$478,000.00	-

CLOSE DATE	APRIL 2016	MAY 2016	JUNE 2016	Total
STAGE	AMOUNT Sum	AMOUNT Sum	AMOUNT Sum	AMOUNT Sum
Prospecting	$0.00	$0.00	$80,000.00	$80,000.00
Qualification	$0.00	$0.00	$100,000.00	$100,000.00
Id. Decision Makers	$0.00	$50,000.00	$0.00	$50,000.00
Closed Won	$60,000.00	$0.00	$85,000.00	$145,000.00
Closed Lost	$270,000.00	$0.00	$0.00	$270,000.00
Total	$330,000.00	$50,000.00	$265,000.00	$645,000.00

Custom Summary Formula

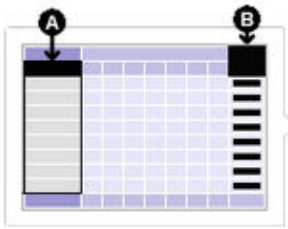
Help for this Page

Column Name: Total Amount

Description:

Format: Currency Decimal Places: 2

Where will this formula be displayed?



This formula calculation will be displayed in the report at the level you select.

- At all summary levels
- At a specific row/column **grouping level**...

A Stage

B Column Grand Summary

Formula | **Functions** | Tips

Summary Fields ▾ Operators ▾ Check Syntax

All | ABS

```
PARENTGROUPVAL(AMOUNT:SUM,
ROW_GRAND_SUMMARY,
COLUMN_GRAND_SUMMARY)
```

ABS(number)

Returns the absolute value of a number, a number without its sign

< Insert

Help on this function

CLOSE DATE	APRIL 2016		MAY 2016		JUNE 2016		Total	
STAGE	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT
Prospecting	$0.00		$0.00		$80,000.00		$80,000.00	$645,000.00
Qualification	$0.00		$0.00		$100,000.00		$100,000.00	$645,000.00
Id. Decision Makers	$0.00		$50,000.00		$0.00		$50,000.00	$645,000.00
Closed Won	$60,000.00		$0.00		$85,000.00		$145,000.00	$645,000.00
Closed Lost	$270,000.00		$0.00		$0.00		$270,000.00	$645,000.00
Total	$330,000.00		$50,000.00		$265,000.00		$645,000.00	

CLOSE DATE	APRIL 2016		MAY 2016		JUNE 2016		Total	
STAGE	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT
Prospecting	$0.00		$0.00		$80,000.00		$80,000.00	12.40%
Qualification	$0.00		$0.00		$100,000.00		$100,000.00	15.50%
Id. Decision Makers	$0.00		$50,000.00		$0.00		$50,000.00	7.75%
Closed Won	$60,000.00		$0.00		$85,000.00		$145,000.00	22.48%
Closed Lost	$270,000.00		$0.00		$0.00		$270,000.00	41.86%
Total	$330,000.00		$50,000.00		$265,000.00		$645,000.00	

Custom Summary Formula

Help for this Page

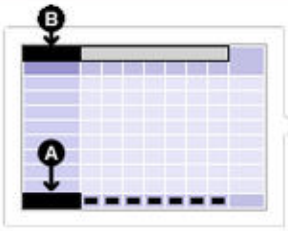
Column Name: Total Amount

Description:

Format: Percent

Decimal Places: 2

Where will this formula be displayed?



This formula calculation will be displayed in the report at the level you select.

- At all summary levels
- At a specific row/column **grouping level**...

A Row Grand Summary

B Close Date (by Calendar Month

Formula | **Functions** | Tips

Summary Fields | Operators | Check Syntax

All | ABS

```
AMOUNT:SUM /
PARENTGROUPVAL(AMOUNT:SUM,
ROW_GRAND_SUMMARY,
COLUMN_GRAND_SUMMARY)
```

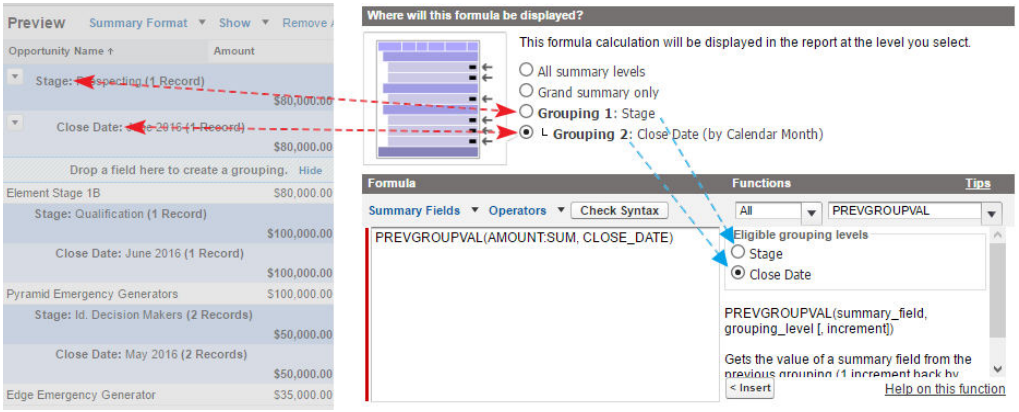
ABS(number)

Returns the absolute value of a number, a number without its sign

< Insert

Help on this function

CLOSE DATE	APRIL 2016		MAY 2016		JUNE 2016		Total	
STAGE	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT	AMOUNT Sum	TOTAL AMOUNT
Prospecting	$0.00		$0.00		$80,000.00		$80,000.00	
Qualification	$0.00		$0.00		$100,000.00		$100,000.00	
Id. Decision Makers	$0.00		$50,000.00		$0.00		$50,000.00	
Closed Won	$60,000.00		$0.00		$85,000.00		$145,000.00	
Closed Lost	$270,000.00		$0.00		$0.00		$270,000.00	
Total	$330,000.00	51.16%	$50,000.00	7.75%	$265,000.00	41.09%	$645,000.00	



STAGE	CLOSE DATE	OPPORTUNITY NAME	AMOUNT Sum	PREV MONTH WON
Prospecting	May 2016	Element Stage 1A	$85,000.00	
		Grand Hotels Kitchen Generator	$15,000.00	
	Subtotal		$100,000.00	-
	June 2016	Element Stage 1B	$80,000.00	
	Subtotal		$80,000.00	$100,000.00
Subtotal			$180,000.00	-
Qualification	June 2016	Pyramid Emergency Generators	$90,000.00	
	Subtotal		$90,000.00	$80,000.00
Subtotal			$90,000.00	-
Id. Decision Makers	May 2016	Edge Emergency Generator	$35,000.00	
	Subtotal		$35,000.00	$90,000.00
Subtotal			$35,000.00	-

Custom Summary Formula

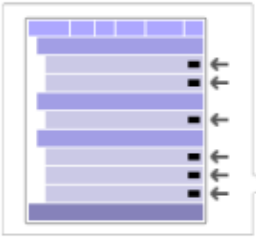
Help for this Page

Column Name: Prev Month Won

Description:

Format: Currency Decimal Places: 2

Where will this formula be displayed?



This formula calculation will be displayed in the report at the level you select.

- ○ All summary levels
- ○ Grand summary only
- ○ **Grouping 1**: Stage
- ◉ └ **Grouping 2**: Close Date (by Calendar Month)

Formula | **Functions** | Tips

Summary Fields ▾ Operators ▾ Check Syntax

All ▾ PREVGROUPVAL ▾

```
PREVGROUPVAL(AMOUNT:SUM, STAGE_NAME)
```

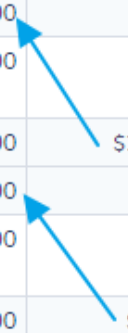
Eligible grouping levels
- ◉ Stage
- ○ Close Date

PREVGROUPVAL(summary_field, grouping_level [, increment])

Gets the value of a summary field from the previous grouping (1 increment back by

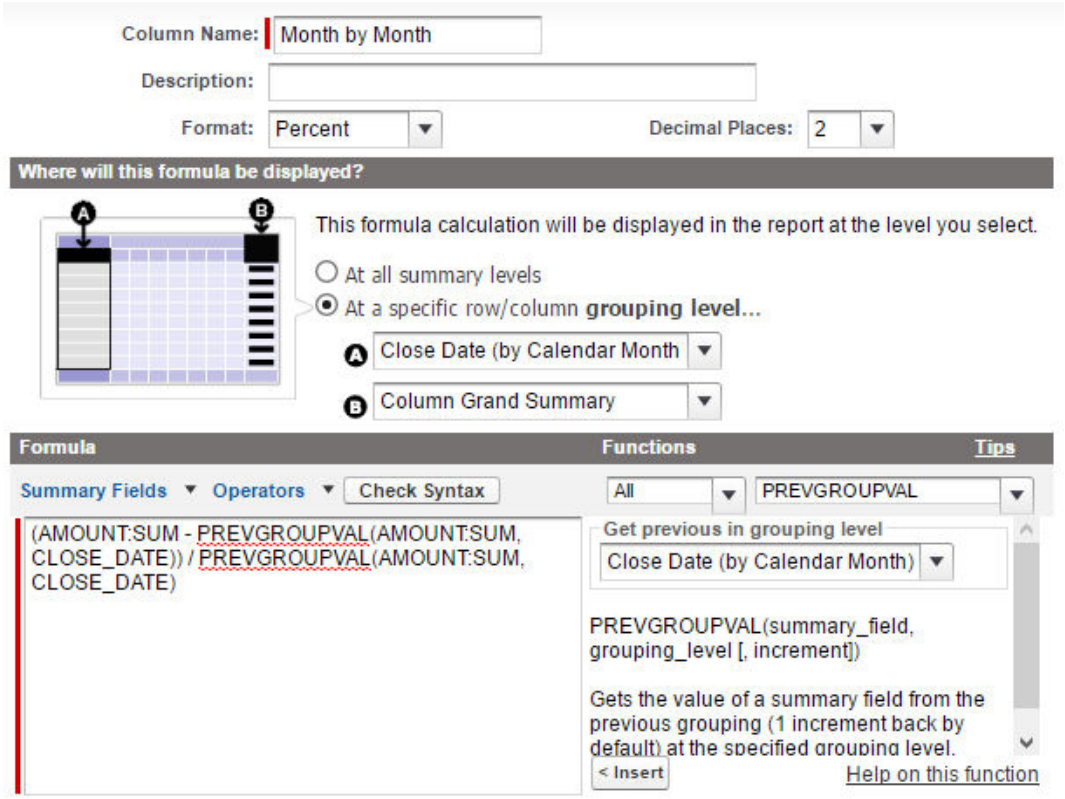
< Insert Help on this function

STAGE	CLOSE DATE	OPPORTUNITY NAME	AMOUNT Sum	PREV MONTH WON
Prospecting (3 records)	May 2016 (2 records)	Element Stage 1A	$85,000.00	
		Grand Hotels Kitchen Generator	$15,000.00	
	Subtotal		$100,000.00	-
	June 2016 (1 record)	Element Stage 1B	$80,000.00	
	Subtotal		$80,000.00	-
Subtotal			$180,000.00	-
Qualification (1 record)	June 2016 (1 record)	Pyramid Emergency Generators	$90,000.00	
	Subtotal		$90,000.00	$180,000.00
Subtotal			$90,000.00	-
Id. Decision Makers (1 record)	May 2016 (1 record)	Edge Emergency Generator	$35,000.00	
	Subtotal		$35,000.00	$90,000.00
Subtotal			$35,000.00	-



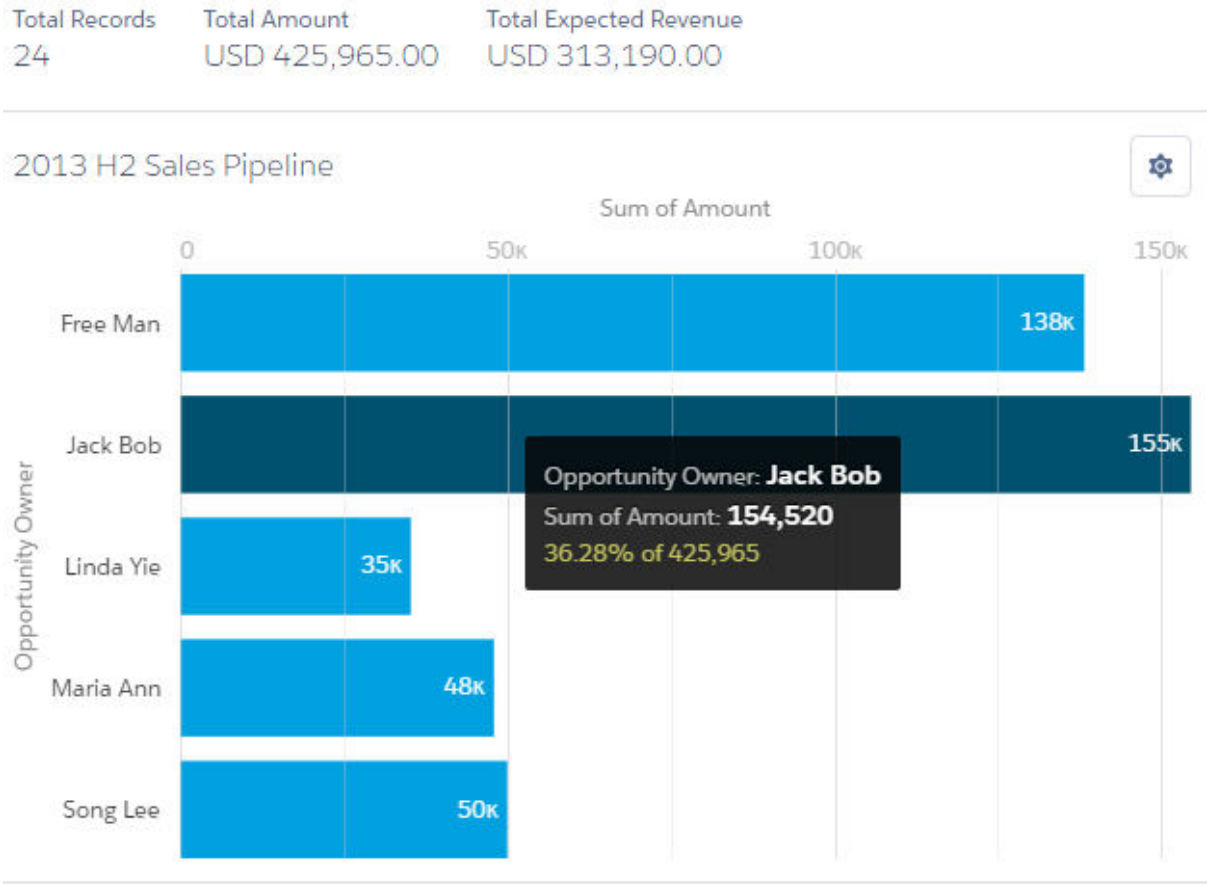
STAGE	CLOSE DATE	OPPORTUNITY NAME	AMOUNT Sum	PREV MONTH WON
Prospecting (3 records)	May 2016 (2 records)	Element Stage 1A	$85,000.00	
		Grand Hotels Kitchen Generator	$15,000.00	
	Subtotal		$100,000.00	-
	June 2016 (1 record)	Element Stage 1B	$80,000.00	
	Subtotal		$80,000.00	-
Subtotal			$180,000.00	-
Qualification (1 record)	June 2016 (1 record)	Pyramid Emergency Generators	$90,000.00	
	Subtotal		$90,000.00	$100,000.00
Subtotal			$90,000.00	-
Id. Decision Makers (1 record)	May 2016 (1 record)	Edge Emergency Generator	$35,000.00	
	Subtotal		$35,000.00	$80,000.00
Subtotal			$35,000.00	-

CLOSE DATE	RECORD COUNT	AMOUNT Sum	PREV MONTH AMOUNT
June 2016	2	$170,000.00	-
July 2016	3	$213,000.00	$170,000.00
September 2016	2	$355,000.00	$213,000.00
October 2016	1	$440,000.00	$355,000.00
GRAND TOTAL	8	$1,178,000.00	-

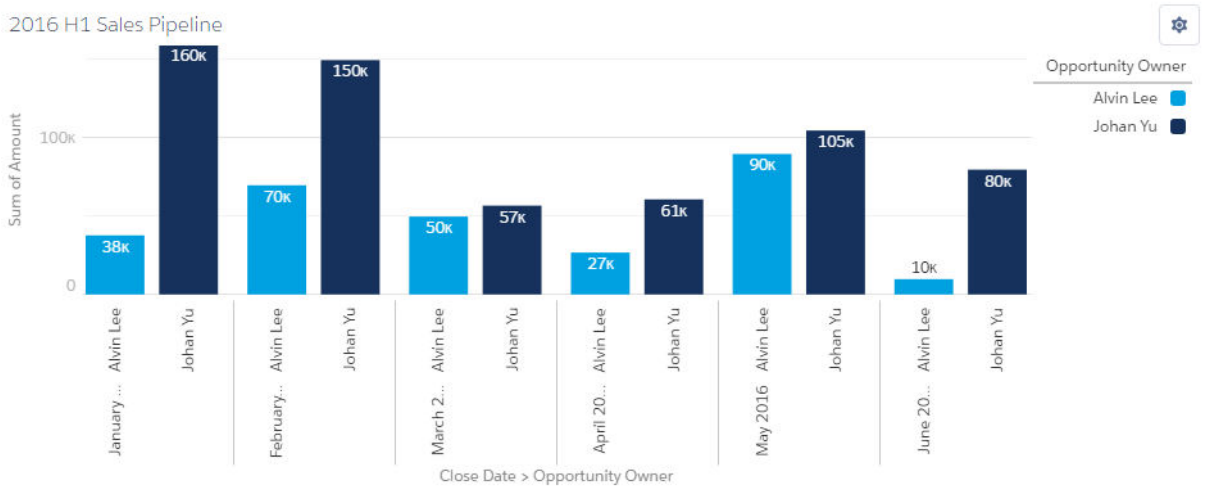


STAGE	QUALIFICATION		ID. DECISION MAKERS		CLOSED WON		Total	
CLOSE DATE	AMOUNT Sum	MONTH BY MONTH	AMOUNT Sum	MONTH BY MONTH	AMOUNT Sum	MONTH BY MONTH	AMOUNT Sum	MONTH BY MONTH
March 2016	$0.00		$15,000.00		$22,000.00		$37,000.00	-
April 2016	$27,000.00		$0.00		$40,000.00		$67,000.00	81.08%
May 2016	$55,000.00		$50,000.00		$0.00		$105,000.00	56.72%
June 2016	$80,000.00		$10,000.00		$0.00		$90,000.00	-14.29%
Total	$162,000.00		$75,000.00		$62,000.00		$299,000.00	

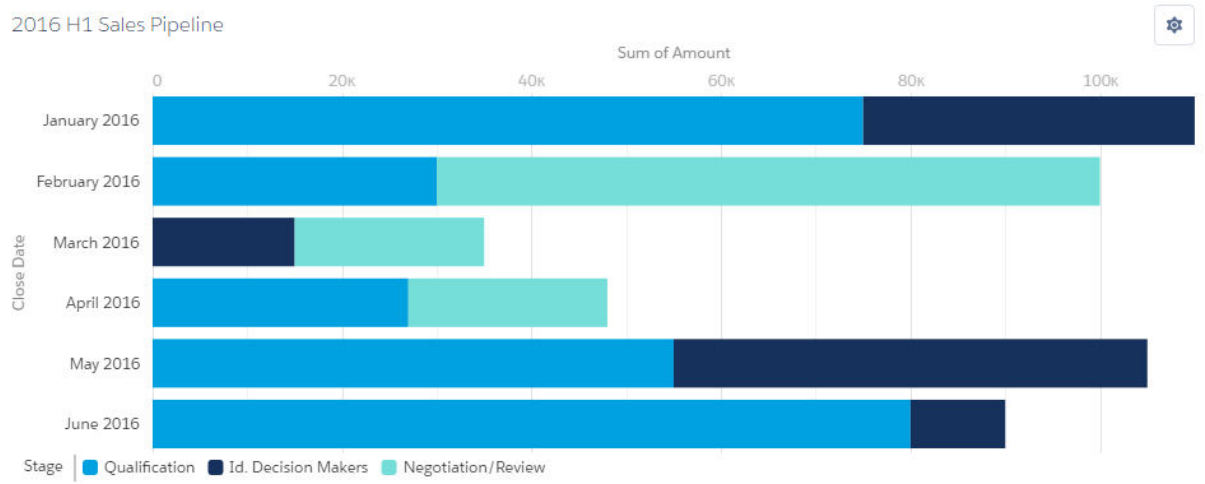
Chapter 7: Adding Charts in Reports and Pages



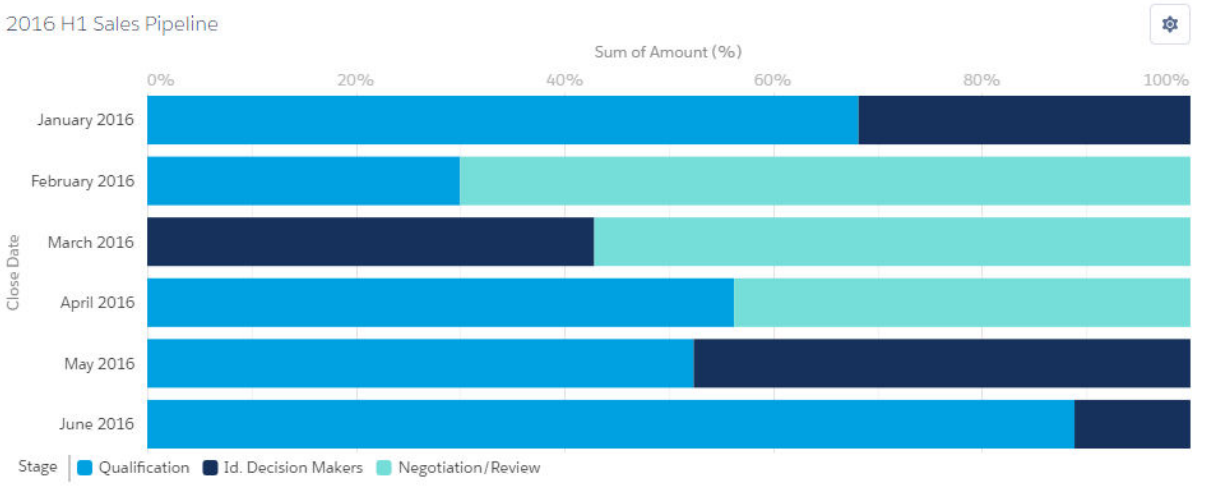
Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00



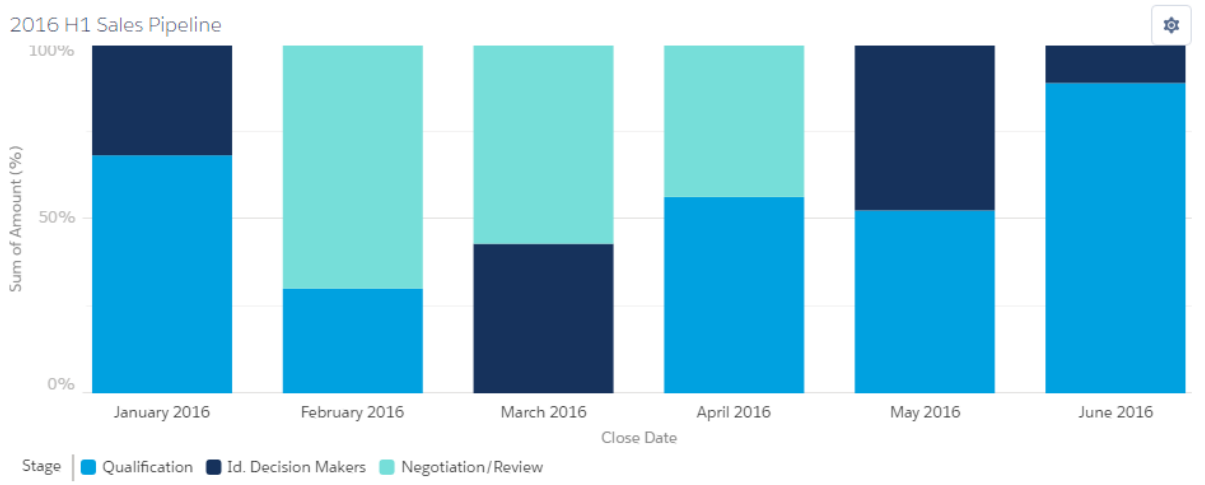
Total Records	Total Amount	Total Expected Revenue
13	$488,000.00	$192,600.00



Total Records	Total Amount	Total Expected Revenue
13	$488,000.00	$192,600.00

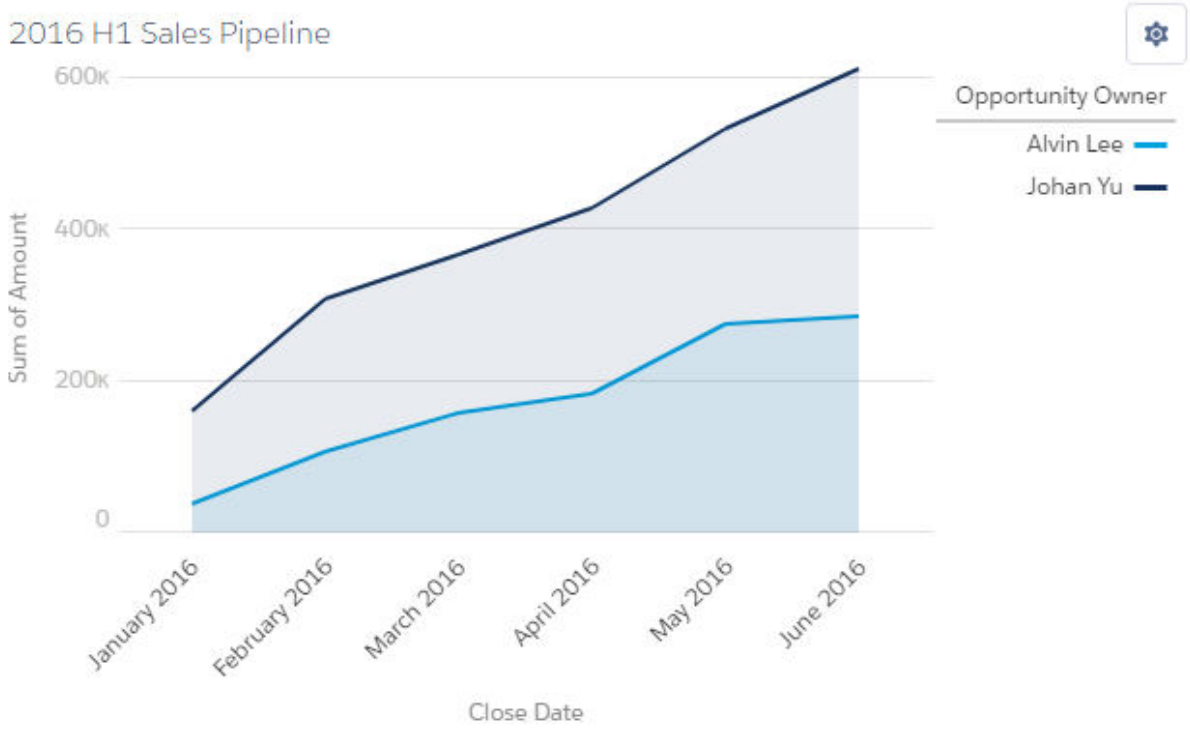


Total Records	Total Amount	Total Expected Revenue
13	$488,000.00	$192,600.00



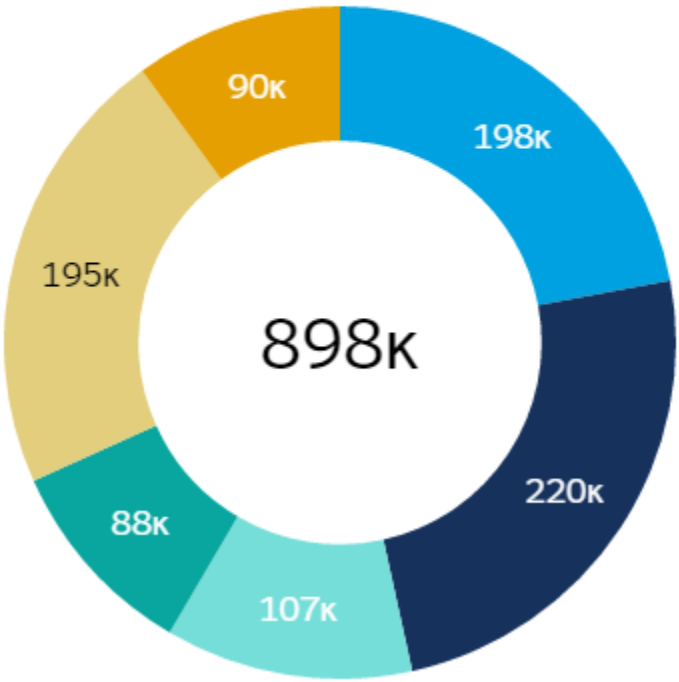
Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00



Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

2016 H1 Sales Pipeline

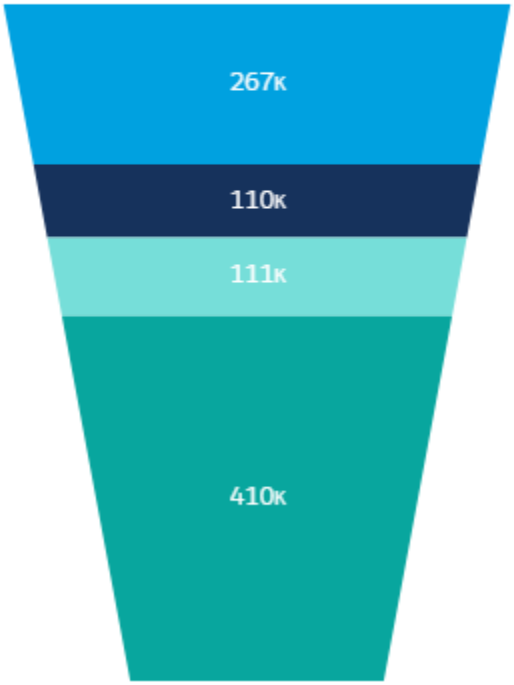


Close Date

- January 2016
- February 2016
- March 2016
- April 2016
- May 2016
- June 2016

Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

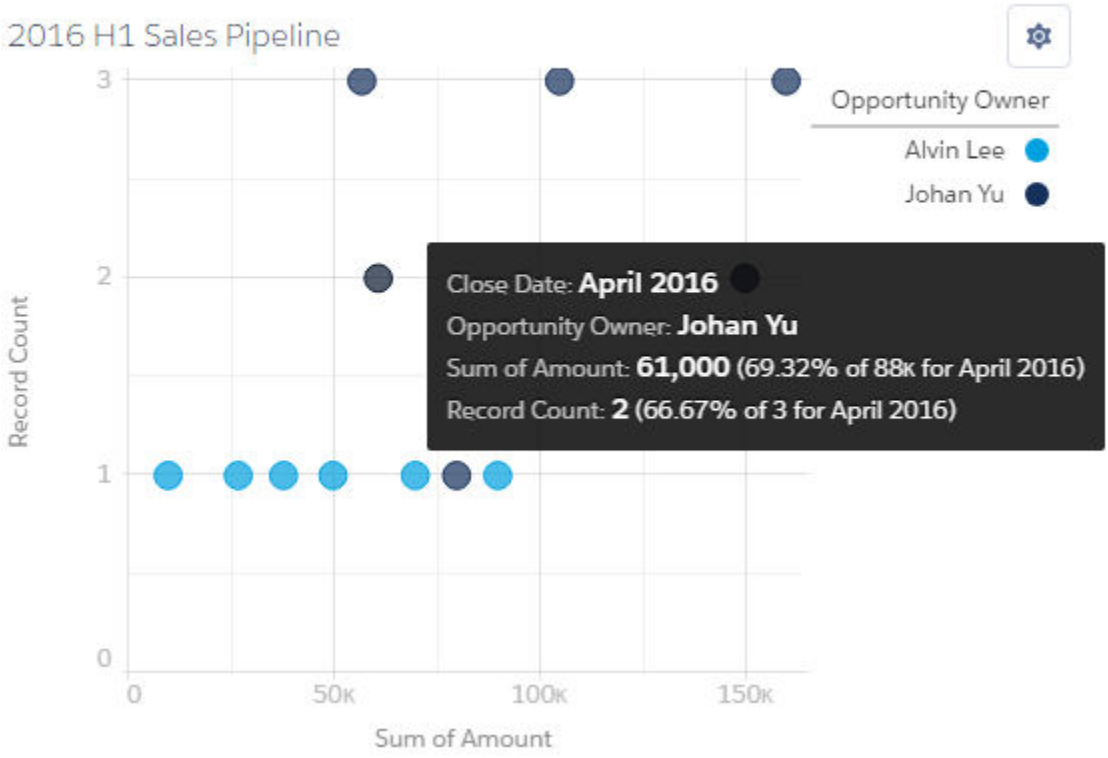
2016 H1 Sales Pipeline



Stage

- Qualification
- Id. Decision Makers
- Negotiation/Review
- Closed Won

Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

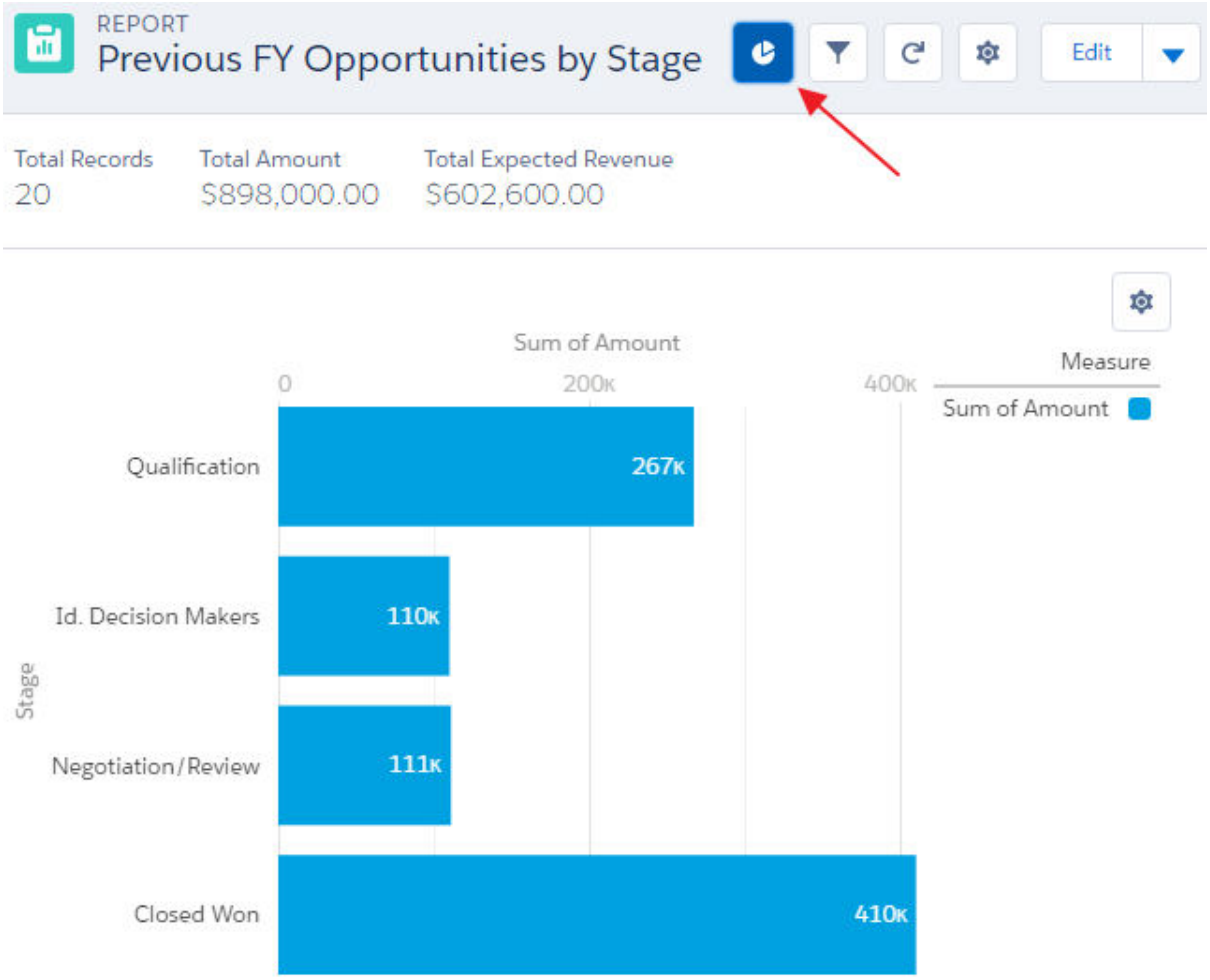


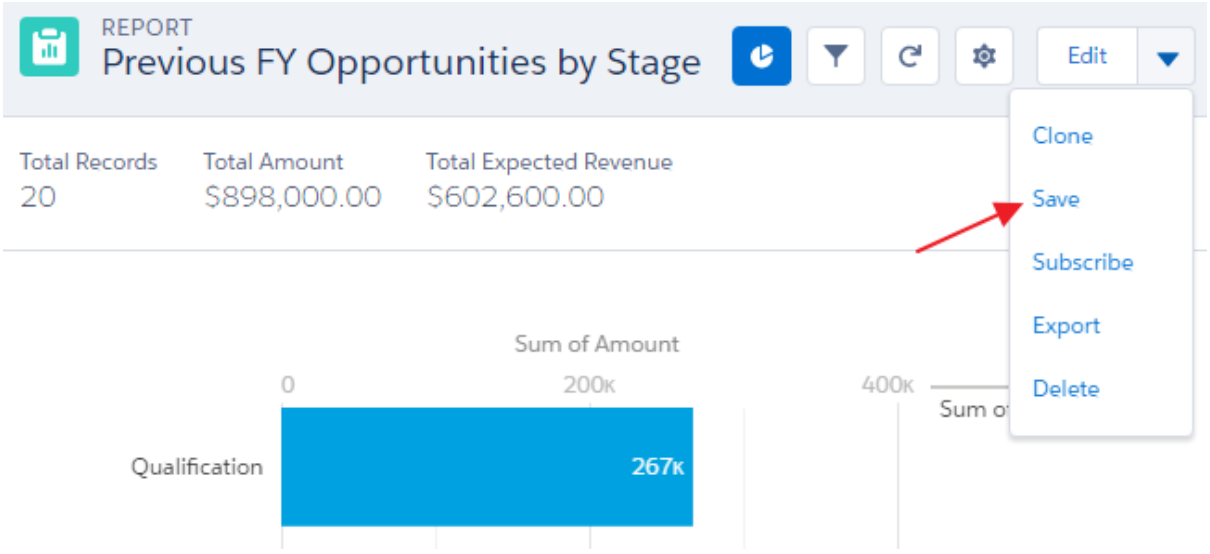
REPORT

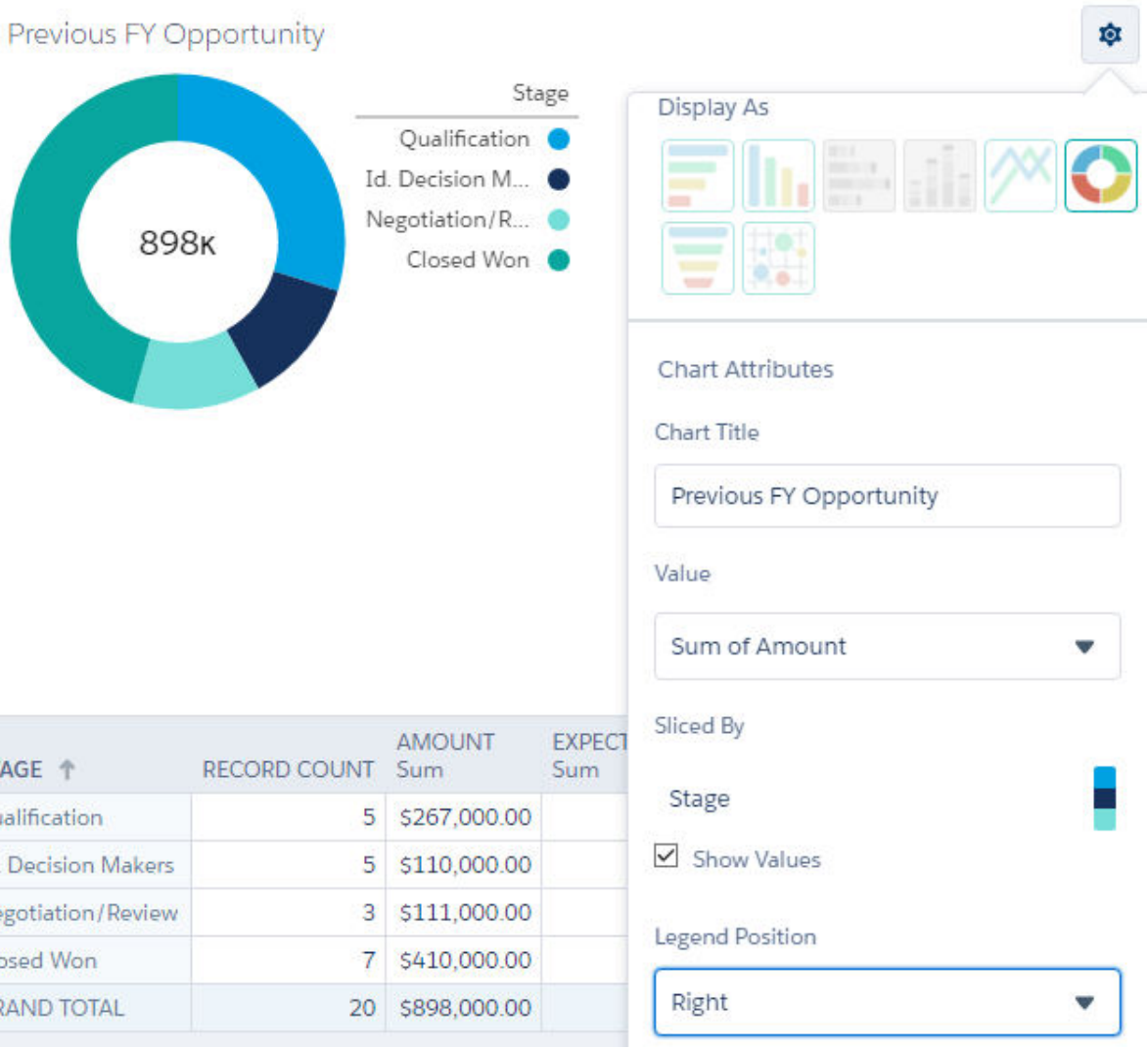
Previous FY Opportunities by Stage

Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

STAGE	RECORD COUNT	AMOUNT Sum	EXPECTED REVENUE Sum
Qualification	5	$267,000.00	$26,700.00
Id. Decision Makers	5	$110,000.00	$66,000.00
Negotiation/Review	3	$111,000.00	$99,900.00
Closed Won	7	$410,000.00	$410,000.00
GRAND TOTAL	20	$898,000.00	$602,600.00


REPORT
Previous FY Opportunities by Stage
Edit
Total Records
20
Total Amount
$898,000.00
Total Expected Revenue
$602,600.00
Sum of Amount
0
200K
400K
Measure
Sum of Amount
Qualification
267K
Id. Decision Makers
110K
Stage
Negotiation/Review
111K
Closed Won
410K

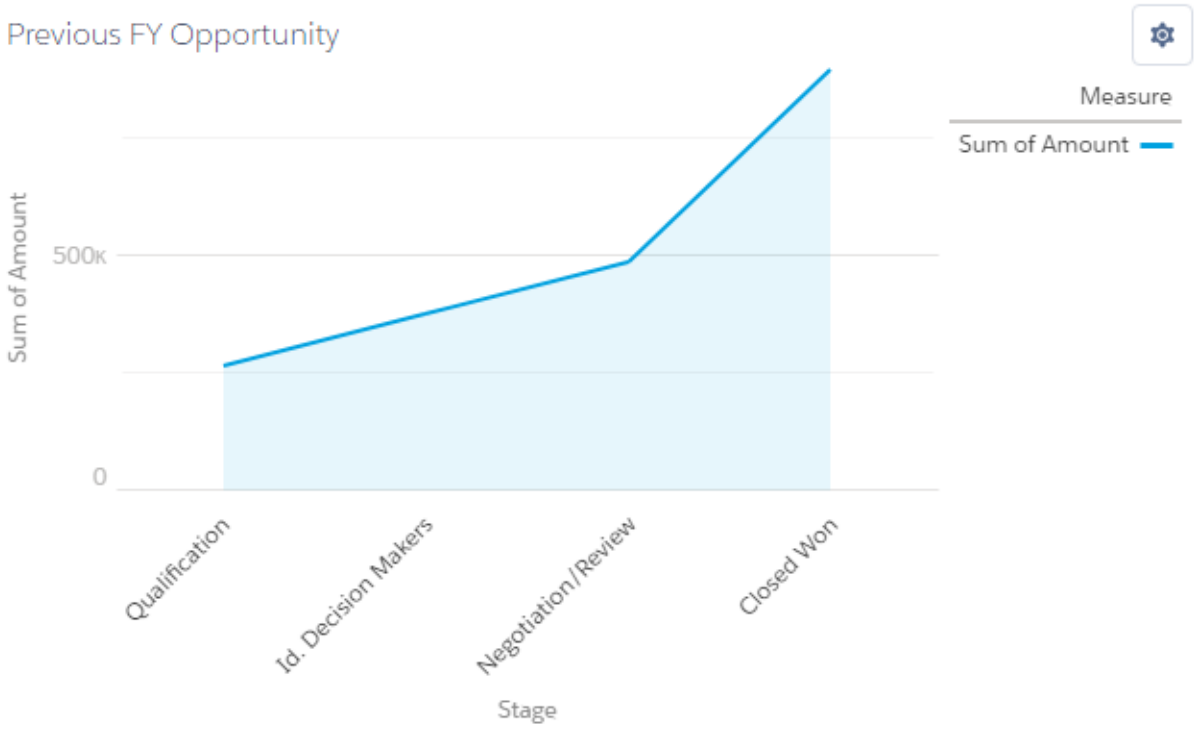

REPORT
Previous FY Opportunities by Stage
Edit
Clone
Save
Subscribe
Export
Delete
Total Records
20
Total Amount
$898,000.00
Total Expected Revenue
$602,600.00
Sum of Amount
0
200K
400K
Qualification
267K

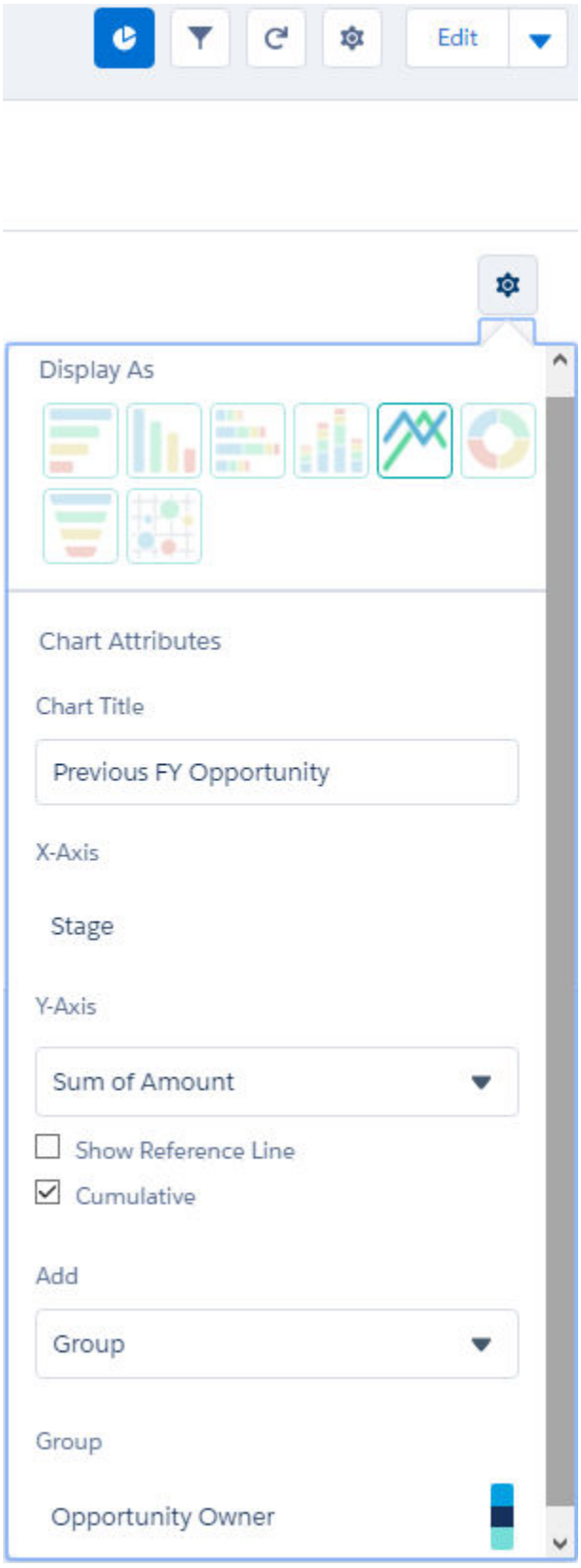


STAGE	RECORD COUNT	AMOUNT Sum	EXPECT Sum
Qualification	5	$267,000.00	
Id. Decision Makers	5	$110,000.00	
Negotiation/Review	3	$111,000.00	
Closed Won	7	$410,000.00	
GRAND TOTAL	20	$898,000.00	

Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

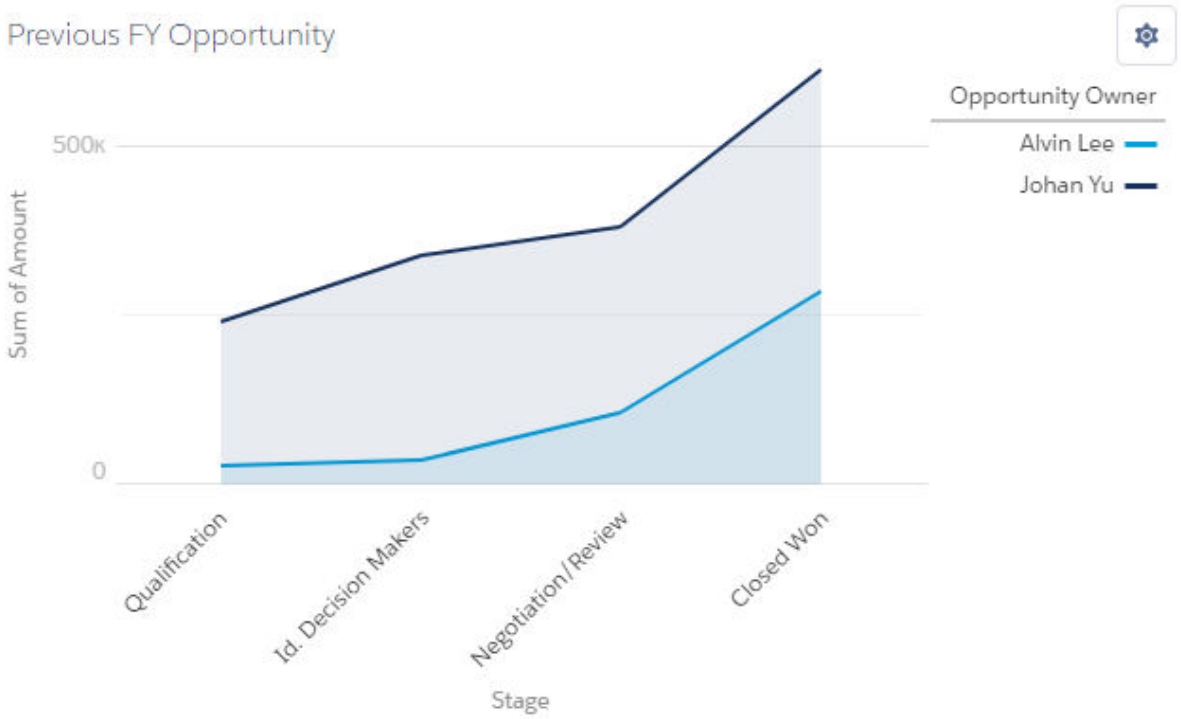
Previous FY Opportunity




Edit
Display As
Chart Attributes
Chart Title
Previous FY Opportunity
X-Axis
Stage
Y-Axis
Sum of Amount
Show Reference Line
Cumulative
Add
Group
Group
Opportunity Owner

Total Records	Total Amount	Total Expected Revenue
20	$898,000.00	$602,600.00

Previous FY Opportunity

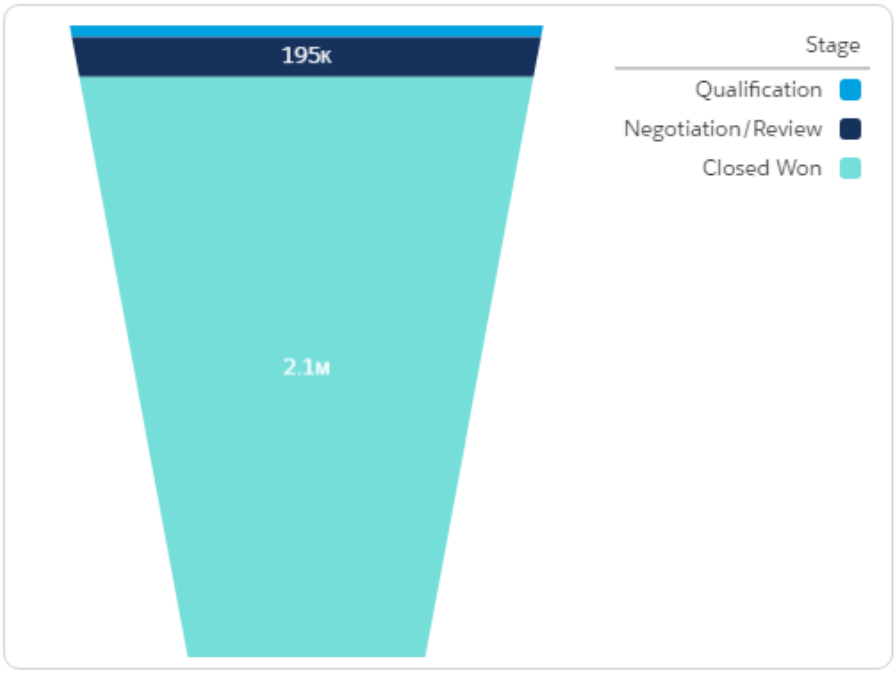


United Oil & Gas Corp.

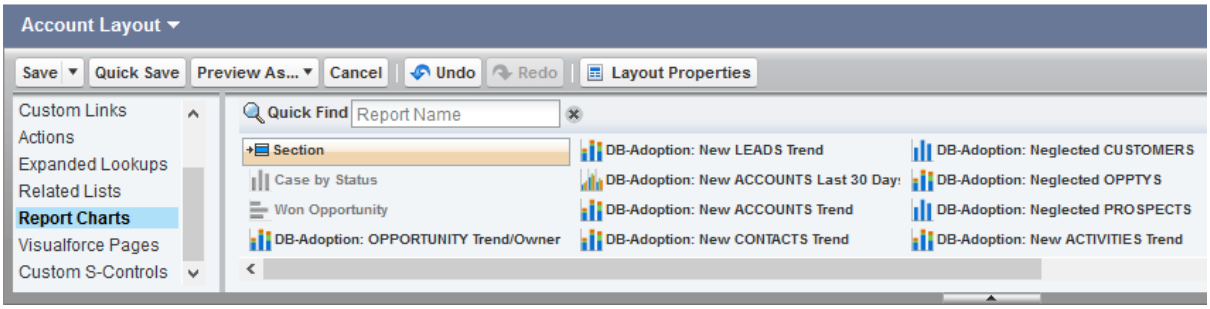
SLA Expiration Date 12/19/2013	SLA Serial Number 6654
Number of Locations 955	Upsell Opportunity Yes
Active Yes	

Charts

This Account Opportunities



As of Today at 7:39 AM


Account Layout
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Custom Links
Actions
Expanded Lookups
Related Lists
Report Charts
Visualforce Pages
Custom S-Controls
Quick Find
Report Name
Section
Case by Status
Won Opportunity
DB-Adoption: OPPORTUNITY Trend/Owner
DB-Adoption: New LEADS Trend
DB-Adoption: New ACCOUNTS Last 30 Day
DB-Adoption: New ACCOUNTS Trend
DB-Adoption: New CONTACTS Trend
DB-Adoption: Neglected CUSTOMERS
DB-Adoption: Neglected OPPTYS
DB-Adoption: Neglected PROSPECTS
DB-Adoption: New ACTIVITIES Trend

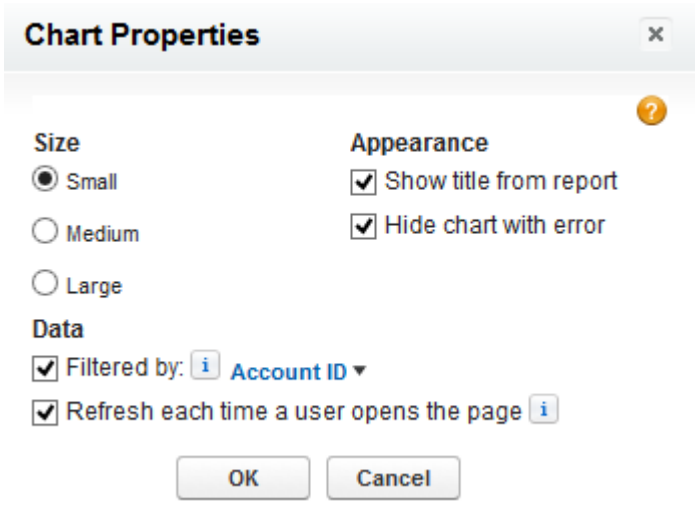
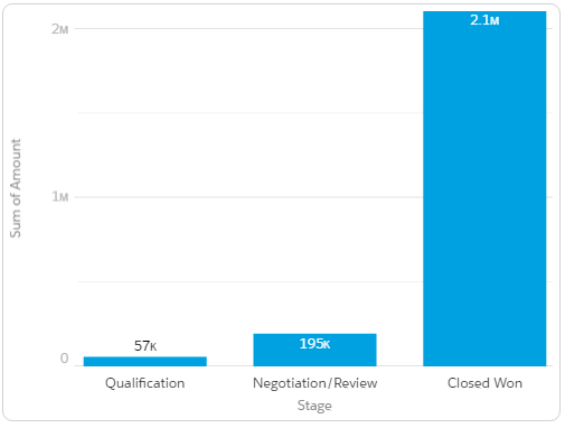


Chart Properties
Size
Small
Medium
Large
Appearance
Show title from report
Hide chart with error
Data
Filtered by:
Account ID
Refresh each time a user opens the page
OK
Cancel

SLA Expiration Date 12/19/2013	SLA Serial Number 6654
Number of Locations 955	Upsell Opportunity Yes
Active Yes	

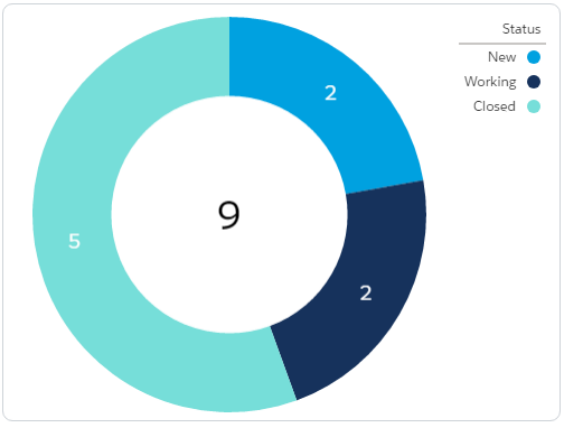
Charts

This Account Opportunities



As of Yesterday at 7:48 AM

This Account Cases

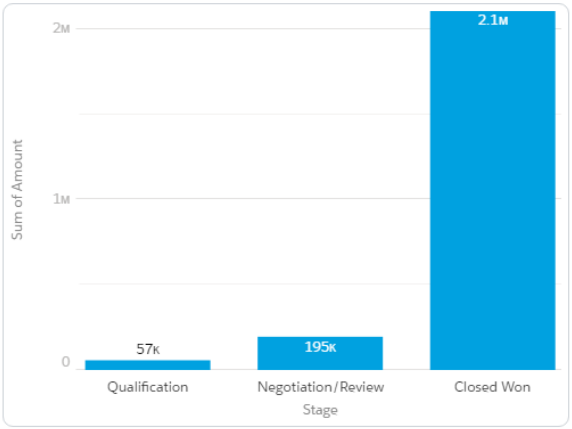


As of Today at 6:47 AM

SLA Expiration Date 12/19/2013	SLA Serial Number 6654
Number of Locations 955	Upsell Opportunity Yes
Active Yes	

Charts

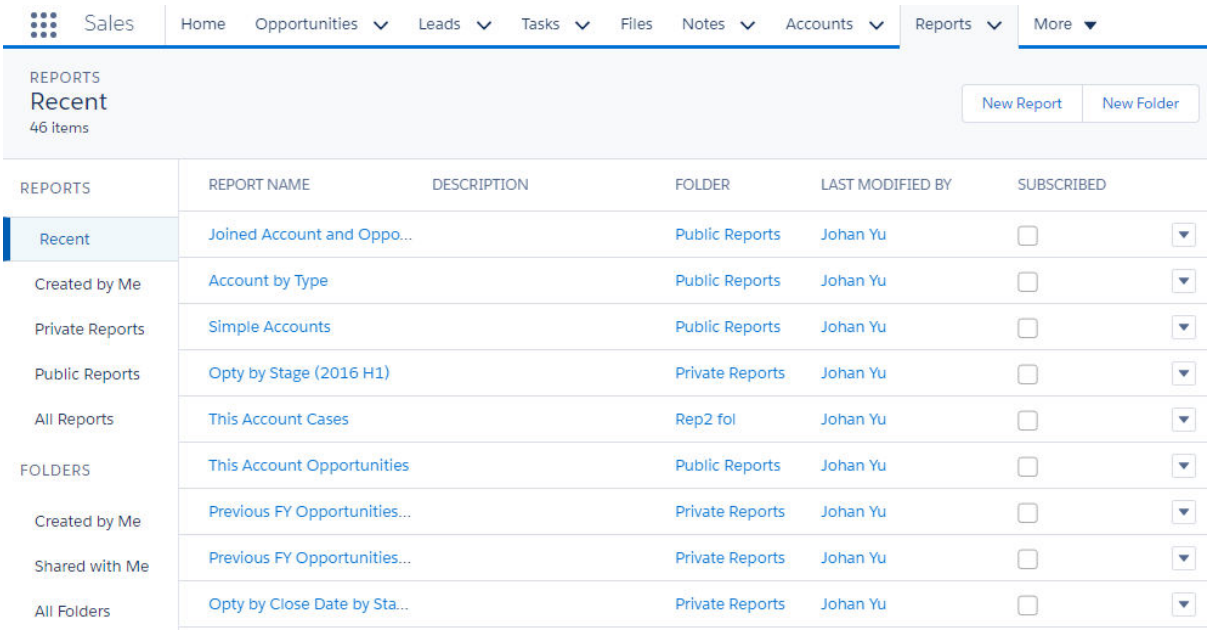
This Account Opportunities

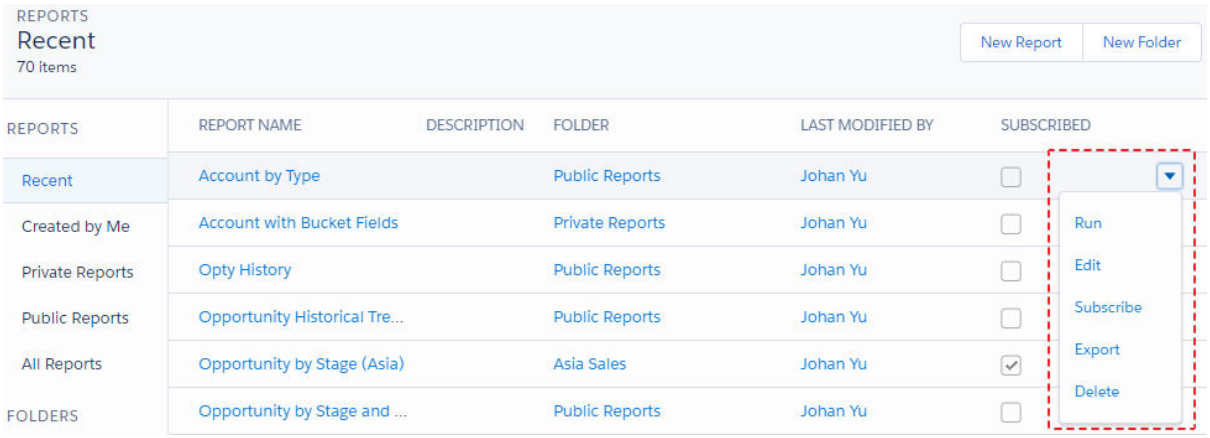


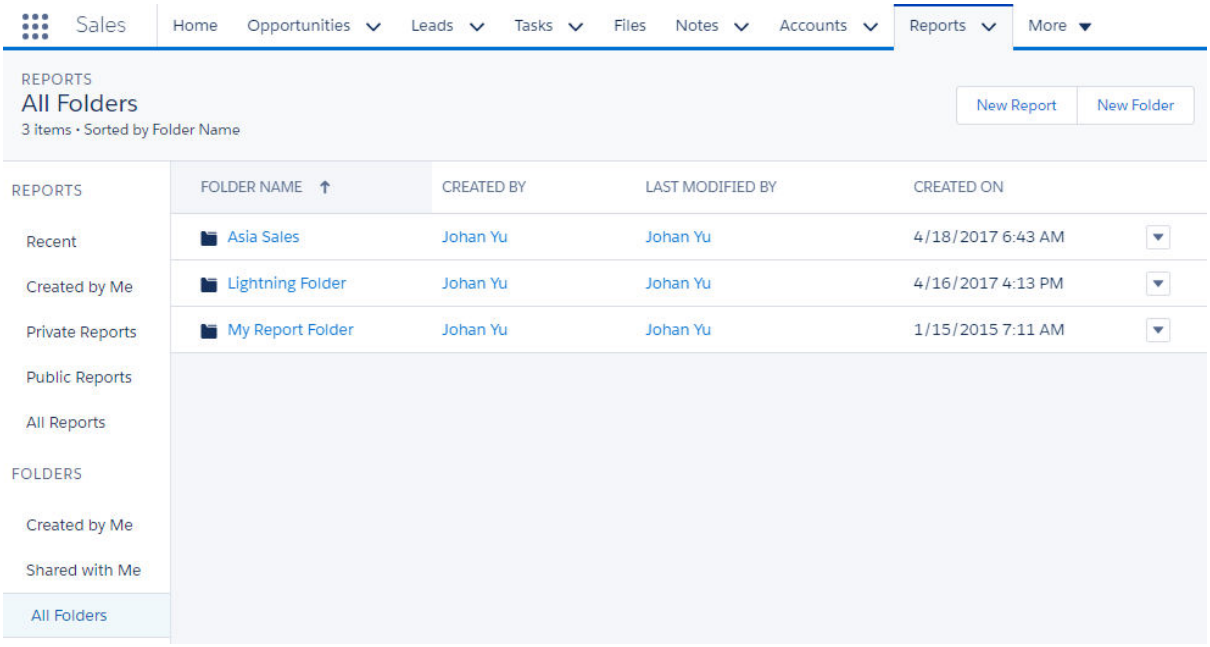
To view the report chart, you need both the Run Reports permission and access to the report's folder.

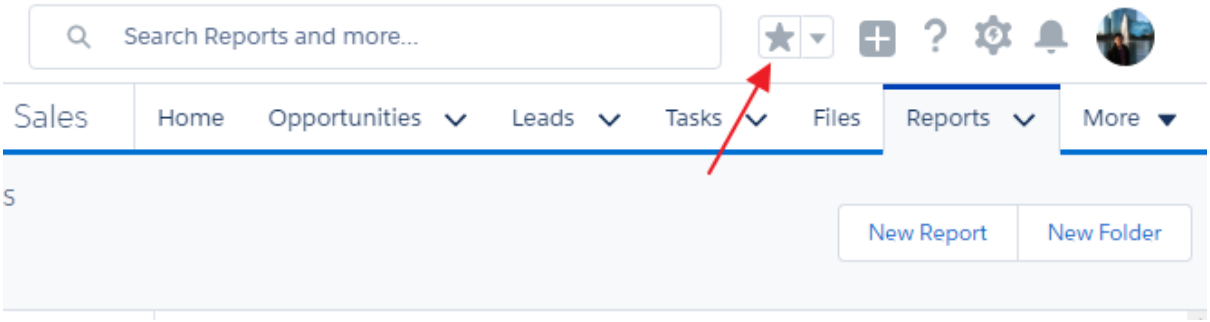
As of Today at 7:11 AM

Chapter 8: Working with Reports






Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Reports
More
REPORTS
All Folders
3 items • Sorted by Folder Name
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
FOLDER NAME
CREATED BY
LAST MODIFIED BY
CREATED ON
Asia Sales
Johan Yu
Johan Yu
4/18/2017 6:43 AM
Lightning Folder
Johan Yu
Johan Yu
4/16/2017 4:13 PM
My Report Folder
Johan Yu
Johan Yu
1/15/2015 7:11 AM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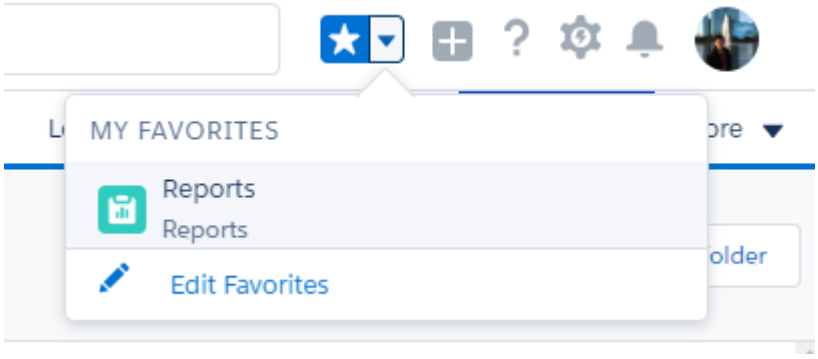
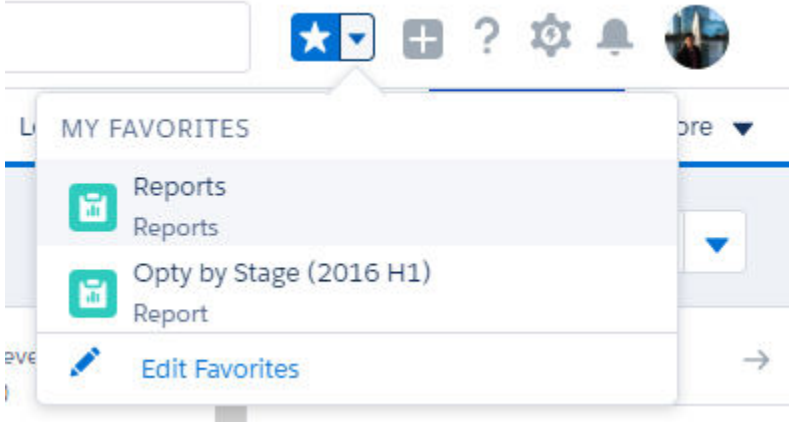
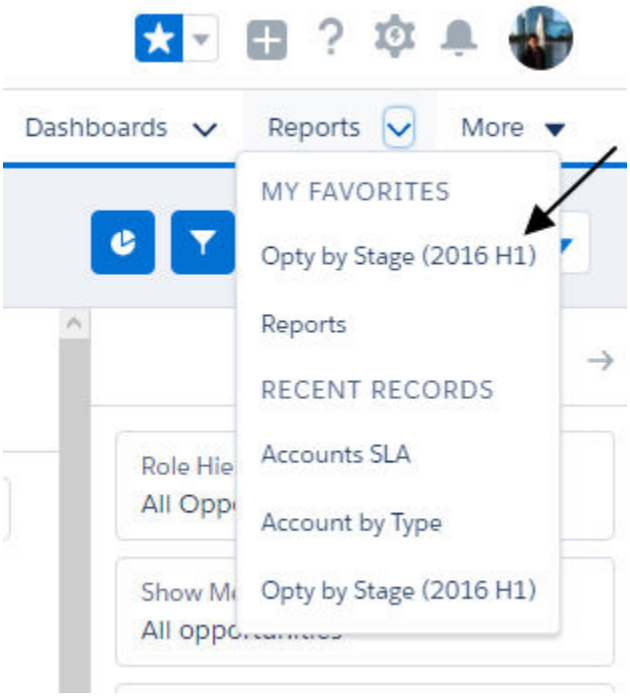
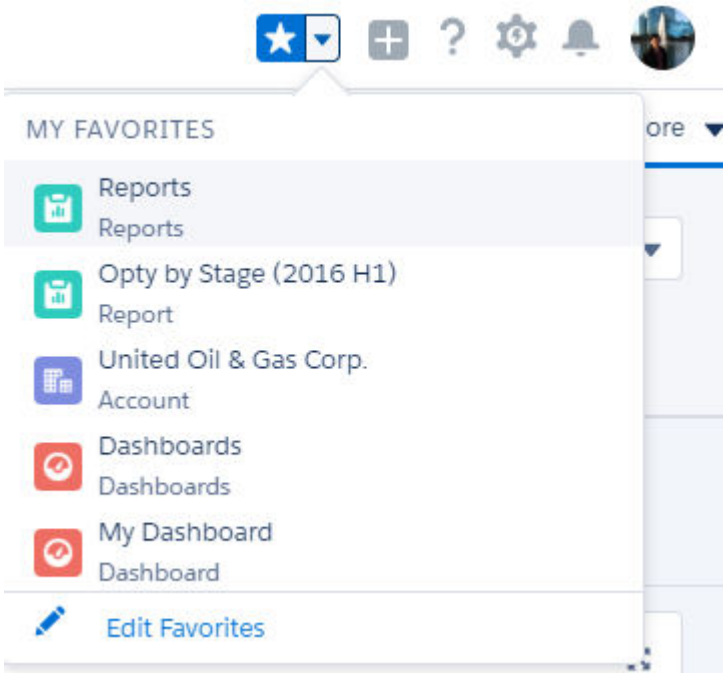
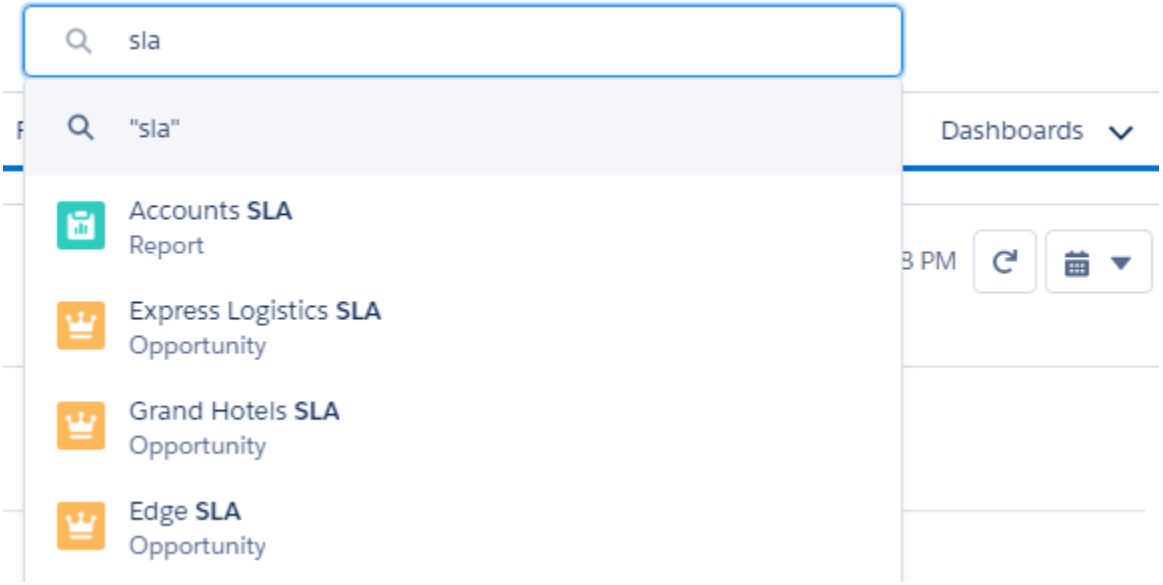
Sales
Home
Opportunities
Leads
Tasks
Files
Reports
More
New Report
New Folder


MY FAVORITES
Reports
Reports
Edit Favorites


MY FAVORITES
Reports
Reports
Opty by Stage (2016 H1)
Report
Edit Favorites


Dashboards
Reports
More
MY FAVORITES
Opty by Stage (2016 H1)
Reports
RECENT RECORDS
Accounts SLA
Account by Type
Opty by Stage (2016 H1)


MY FAVORITES
ore
Reports
Reports
Opty by Stage (2016 H1)
Report
United Oil & Gas Corp.
Account
Dashboards
Dashboards
My Dashboard
Dashboard
Edit Favorites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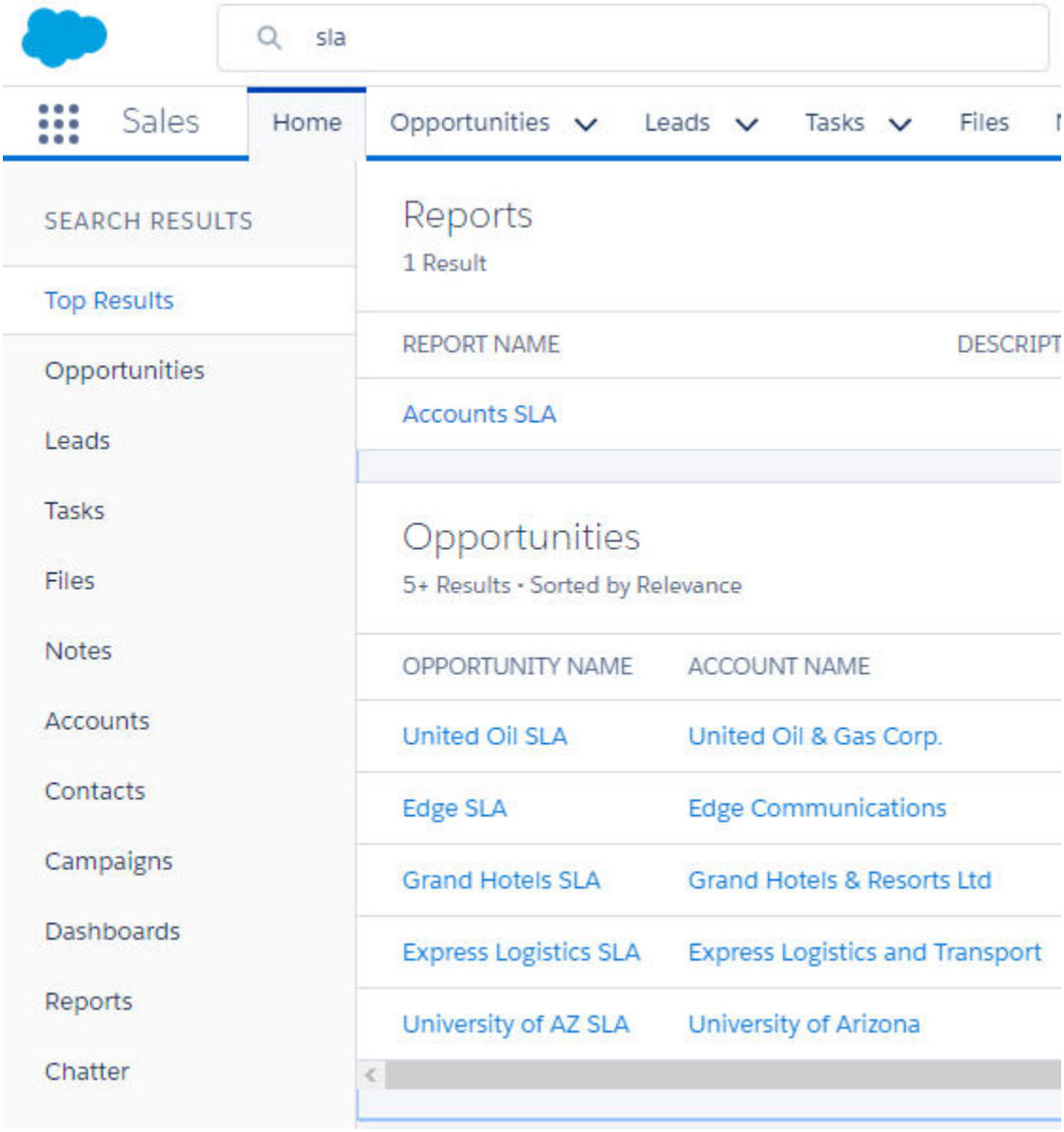
Dashboards
Accounts SLA
Report
Express Logistics SLA
Opportunity
Grand Hotels SLA
Opportunity
Edge SLA
Opportunity
3 PM


sla
Sales
Home
Opportunities
Leads
Tasks
Files
SEARCH RESULTS
Top Results
Opportunities
Leads
Tasks
Files
Notes
Accounts
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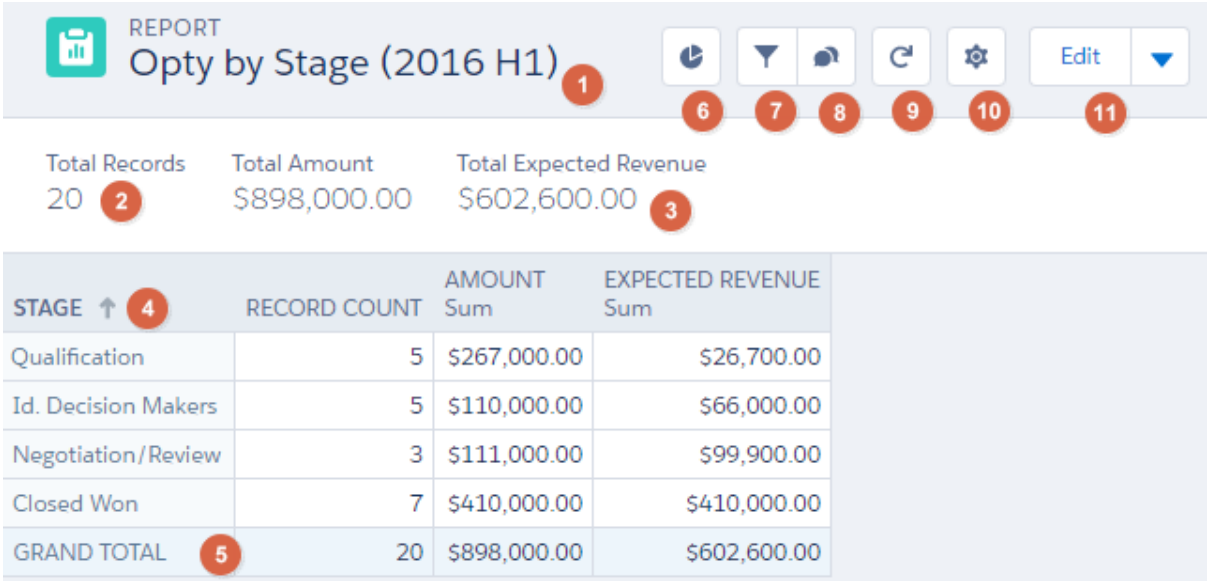
Campaigns
Dashboards
Reports
Chatter
Reports
1 Result
REPORT NAME
DESCRIPT
Accounts SLA
Opportunities
5+ Results • Sorted by Relevance
OPPORTUNITY NAME
ACCOUNT NAME
United Oil SLA
United Oil & Gas Corp.
Edge SLA
Edge Communications
Grand Hotels SLA
Grand Hotels & Resorts Ltd
Express Logistics SLA
Express Logistics and Transport
University of AZ SLA
University of Arizona

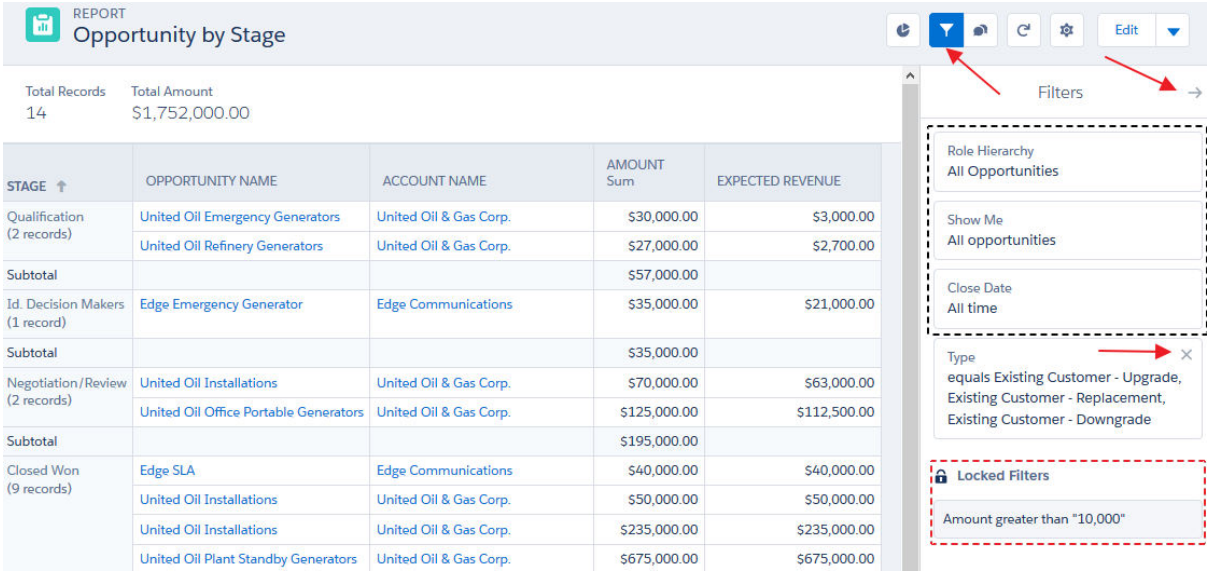


REPORT

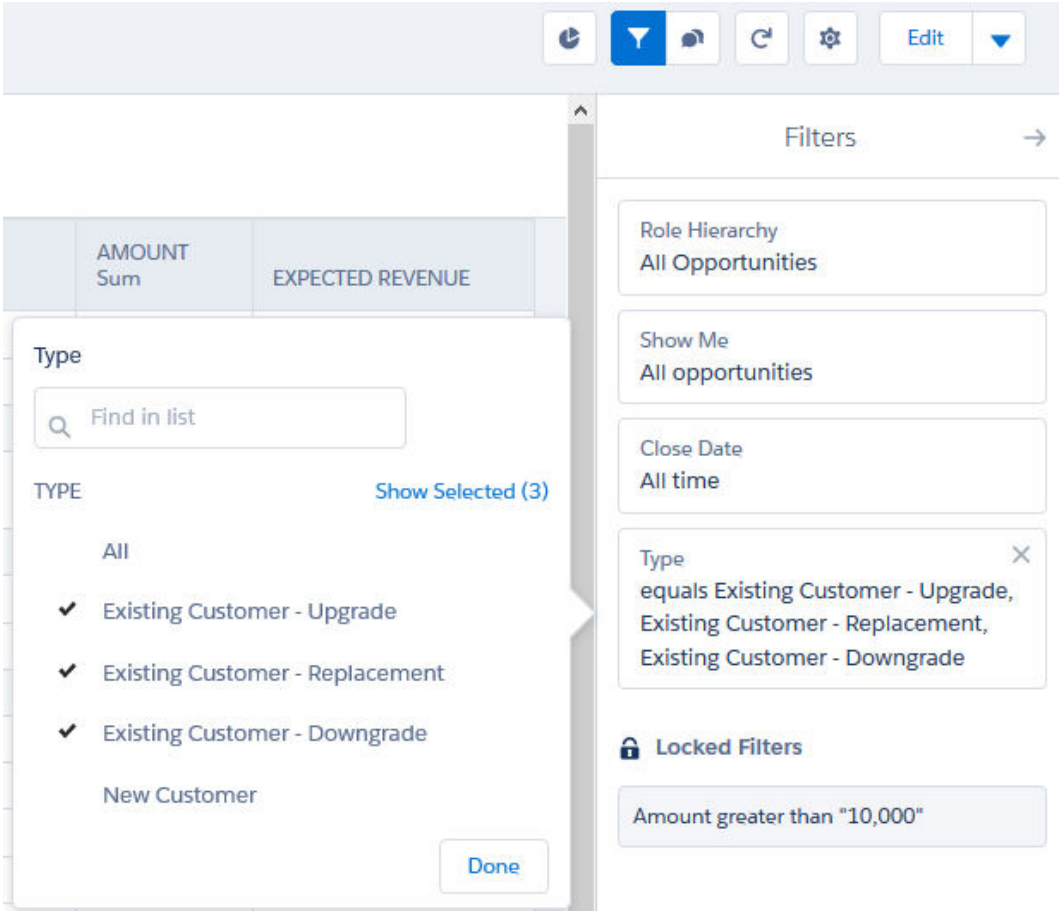
Opty by Stage (2016 H1)

Total Records	Total Amount	Total Expected Revenue	Average Expected Revenue
20	$898,000.00	$602,600.00	$30,130.00

STAGE	OPPORTUNITY NAME	AMOUNT Sum	EXPECTED REVENUE Sum	Avg
Qualification (5 records)	Edge Emergency Generator	$75,000.00	$7,500.00	
	United Oil Emergency Generators	$30,000.00	$3,000.00	
	Element Stage 1A	$55,000.00	$5,500.00	
	Element Stage 1B	$80,000.00	$8,000.00	
	United Oil Refinery Generators	$27,000.00	$2,700.00	
Subtotal		$267,000.00	$26,700.00	$5,340.00



STAGE	OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT Sum	EXPECTED REVENUE
Qualification (2 records)	United Oil Emergency Generators	United Oil & Gas Corp.	$30,000.00	$3,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	$27,000.00	$2,700.00
Subtotal			$57,000.00	
Id. Decision Makers (1 record)	Edge Emergency Generator	Edge Communications	$35,000.00	$21,000.00
Subtotal			$35,000.00	
Negotiation/Review (2 records)	United Oil Installations	United Oil & Gas Corp.	$70,000.00	$63,000.00
	United Oil Office Portable Generators	United Oil & Gas Corp.	$125,000.00	$112,500.00
Subtotal			$195,000.00	
Closed Won (9 records)	Edge SLA	Edge Communications	$40,000.00	$40,000.00
	United Oil Installations	United Oil & Gas Corp.	$50,000.00	$50,000.00
	United Oil Installations	United Oil & Gas Corp.	$235,000.00	$235,000.00
	United Oil Plant Standby Generators	United Oil & Gas Corp.	$675,000.00	$675,000.00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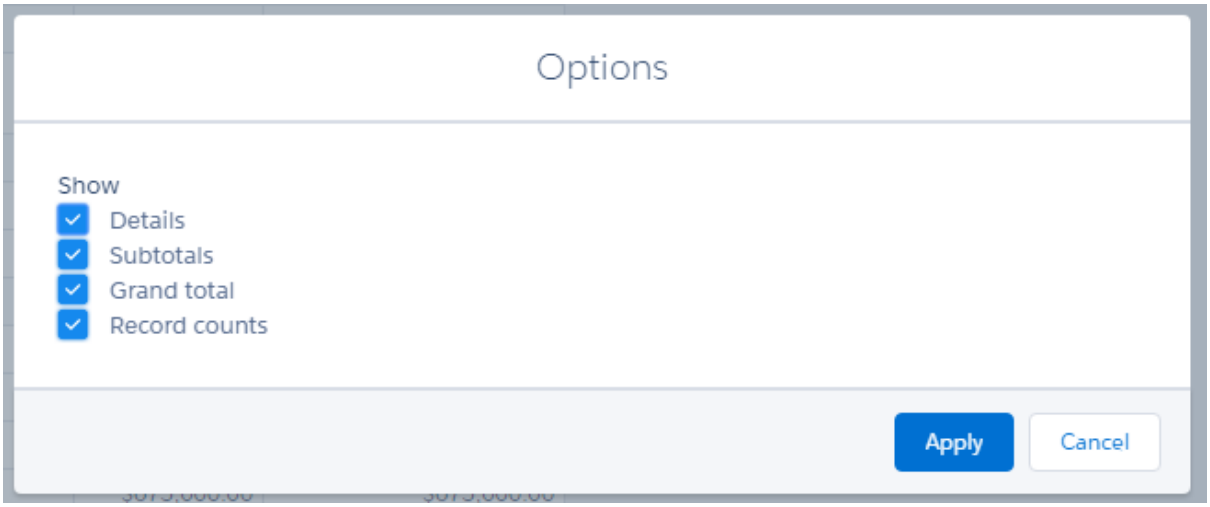
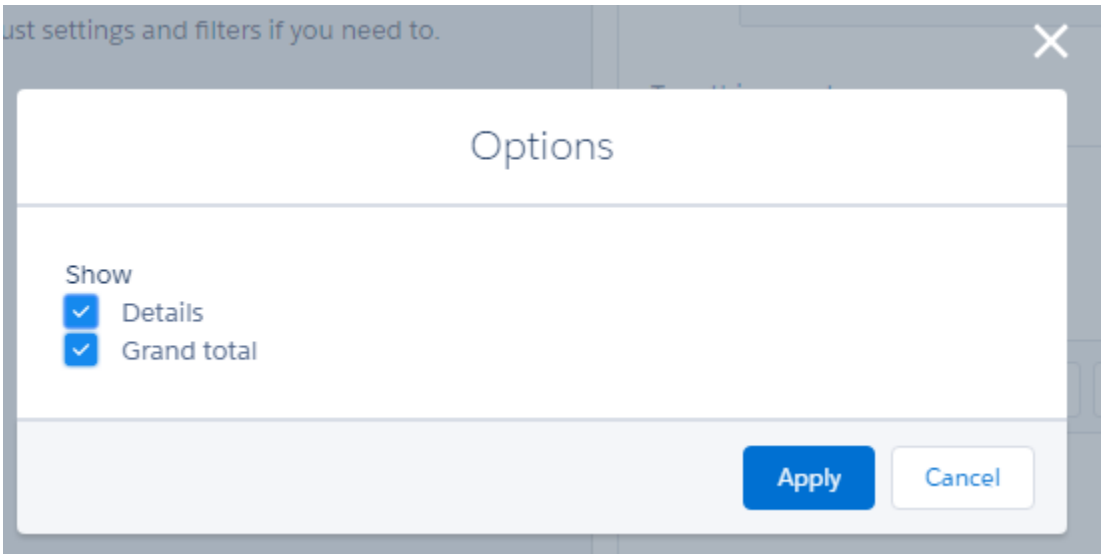
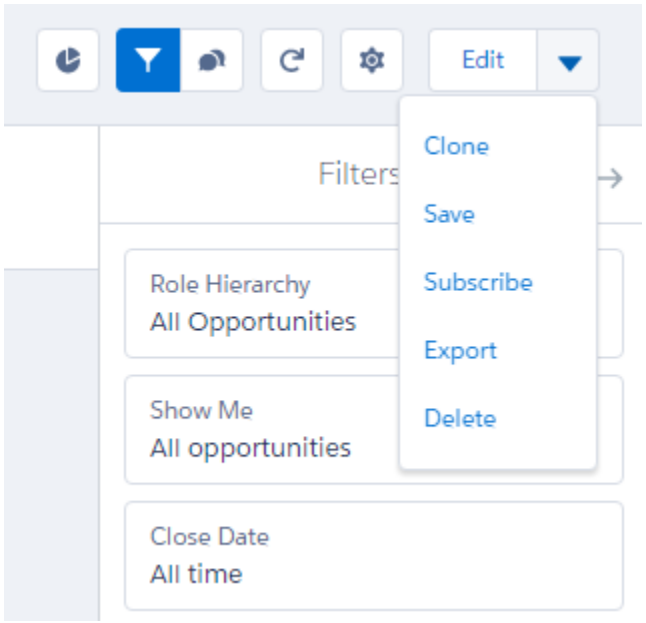
Filters
AMOUNT
Sum
EXPECTED REVENUE
Type
Find in list
TYPE
Show Selected (3)
All
Existing Customer - Upgrade
Existing Customer - Replacement
Existing Customer - Downgrade
New Customer
Done
Role Hierarchy
All Opportunities
Show Me
All opportunities
Close Date
All time
Type
equals Existing Customer - Upgrade, Existing Customer - Replacement, Existing Customer - Downgrade
Locked Filters
Amount greater than "10,000"


Options
Show
Details
Subtotals
Grand total
Record counts
Apply
Cancel


ust settings and filters if you need to.
Options
Show
Details
Grand total
Apply
Cancel


Edit
Clone
Save
Subscribe
Export
Delete
Filters
Role Hierarchy
All Opportunities
Show Me
All opportunities
Close Date
All time

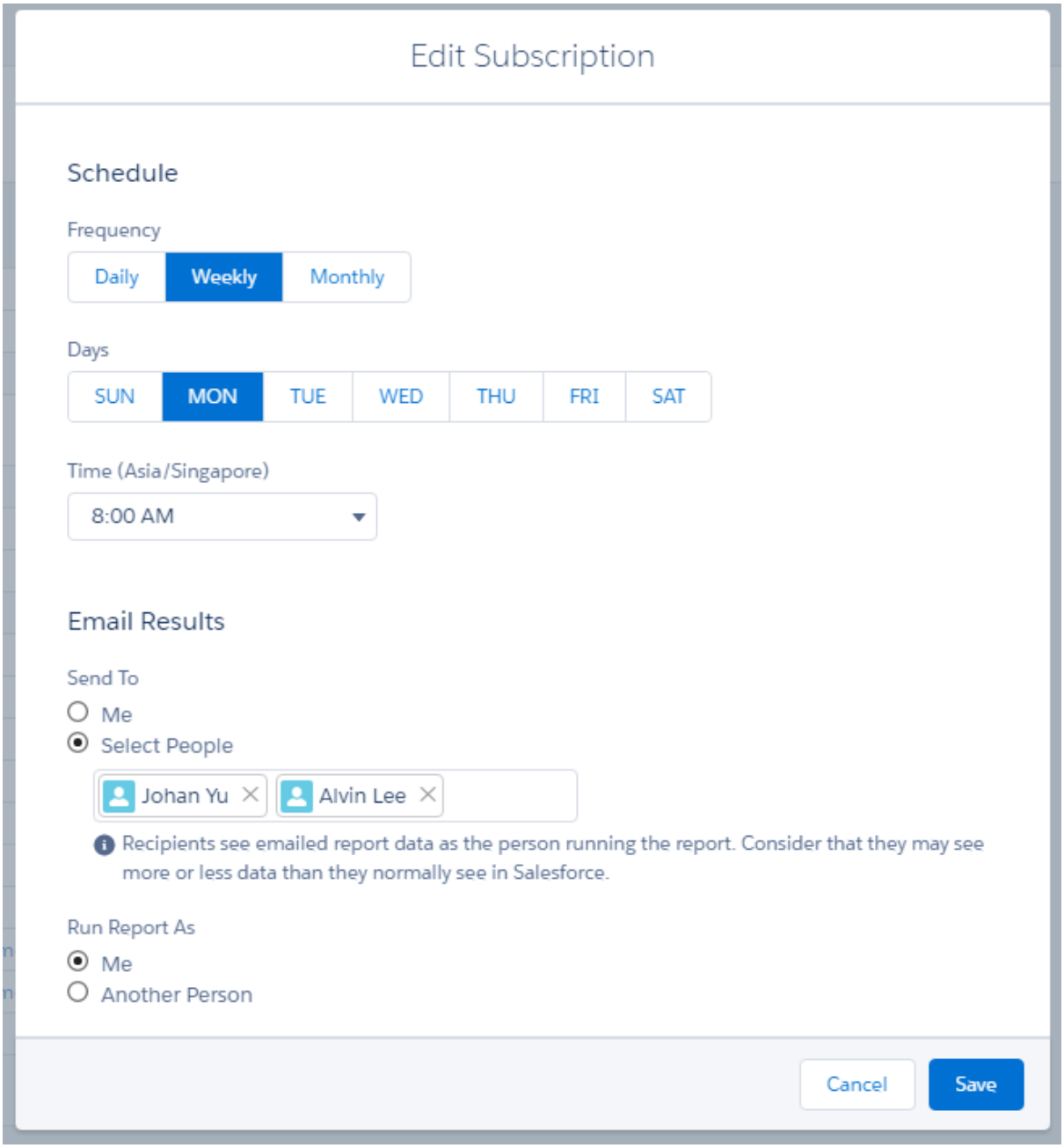
Opportunity by Stage

As of 5/8/17 at 11:00 PM · Viewing as Johan Yu · Report subscription started by Johan Yu

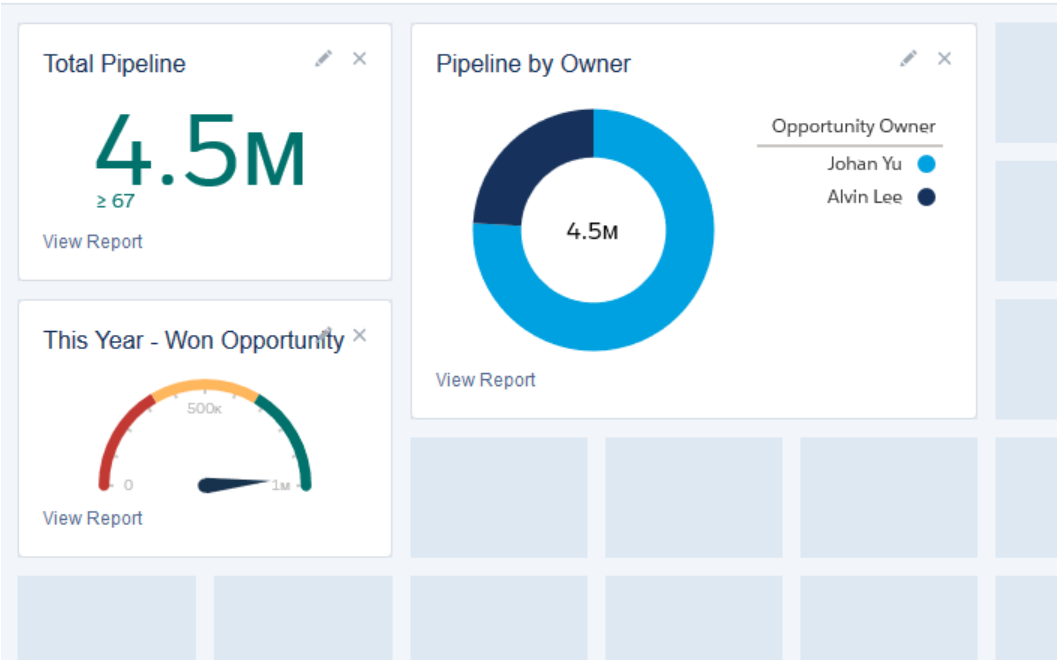
All opportunities·Close Date: Custom·Amount greater than "10,000"·Type equals Existing Customer - Upgrade,Existing Customer - Replacement,Existing Customer - Downgrade

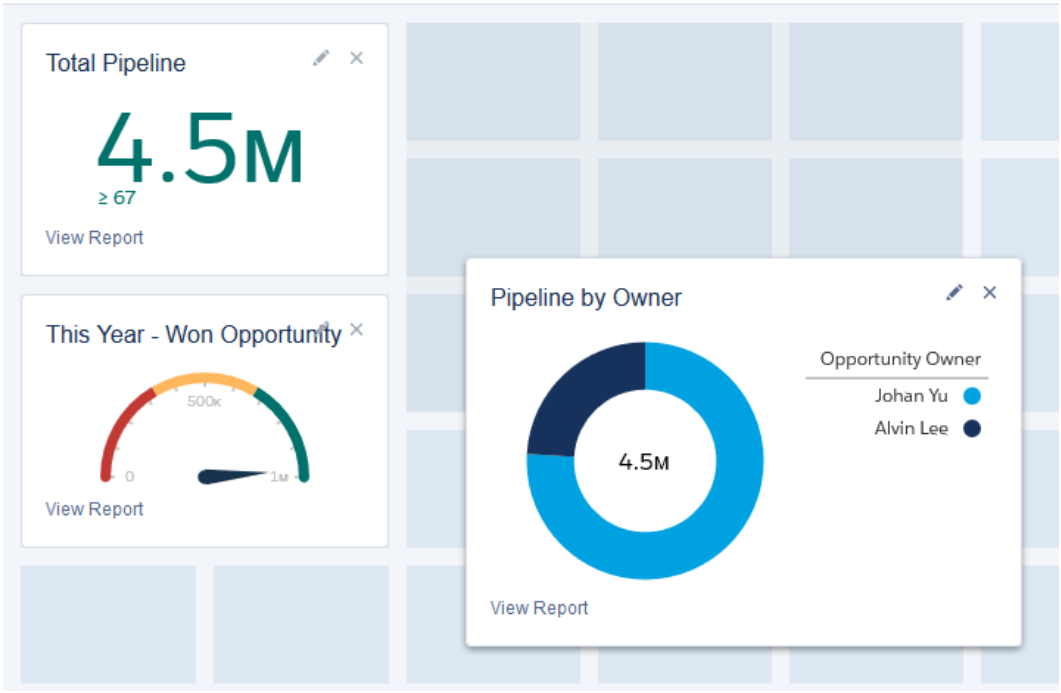
Total Records	Total Amount
14	$1,752,000.00

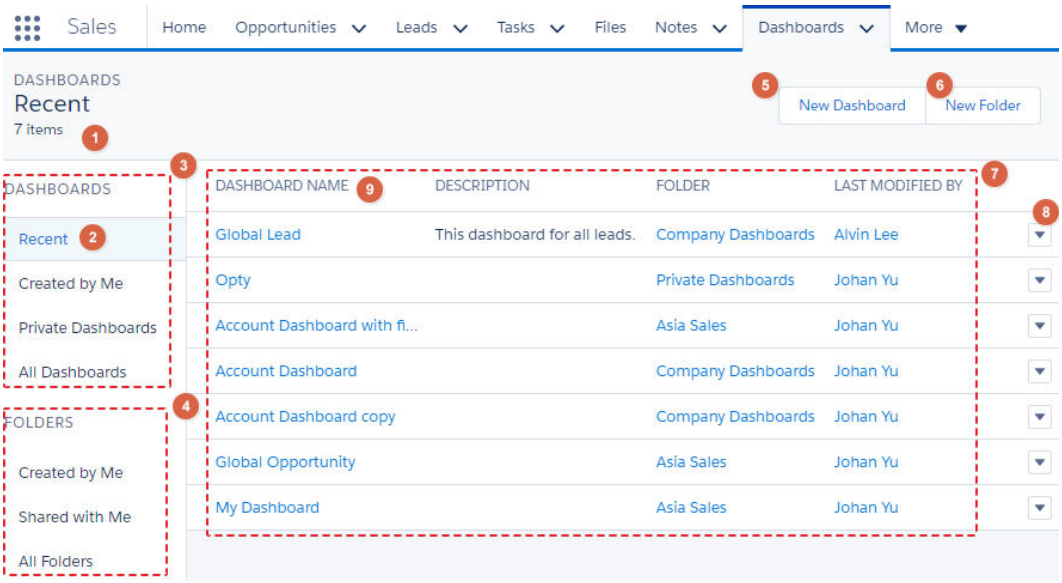
Stage↑	Opportunity Name	Account Name	Amount Sum	Expected Revenue
Qualification (2 records)	United Oil Emergency Generators	United Oil & Gas Corp.	$30,000.00	$3,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	$27,000.00	$2,700.00
			$57,000.00	
Id. Decision Makers (1 record)	Edge Emergency Generator	Edge Communications	$35,000.00	$21,000.00
			$35,000.00	
Negotiation/Review (2 records)	United Oil Installations	United Oil & Gas Corp.	$70,000.00	$63,000.00
	United Oil Office Portable Generators	United Oil & Gas Corp.	$125,000.00	$112,500.00
			$195,000.00	
Closed Won (9 records)	Edge SLA	Edge Communications	$40,000.00	$40,000.00
	United Oil Installations	United Oil & Gas Corp.	$50,000.00	$50,000.00
	United Oil Installations	United Oil & Gas Corp.	$235,000.00	$235,000.00
	United Oil Plant Standby Generators	United Oil & Gas Corp.	$675,000.00	$675,000.00
	United Oil SLA	United Oil & Gas Corp.	$120,000.00	$120,000.00
	United Oil Standby Generators	United Oil & Gas Corp.	$120,000.00	$120,000.00
	Edge Installation	Edge Communications	$50,000.00	$50,000.00
	Project Motor Links in Kentica	Burlington Textiles Corp of America	$75,000.00	$75,000.00
	Project Motor Head	Burlington Textiles Corp of America	$100,000.00	$100,000.00
			$1,465,000.00	
Grand Total (14 records)			$1,752,000.00	

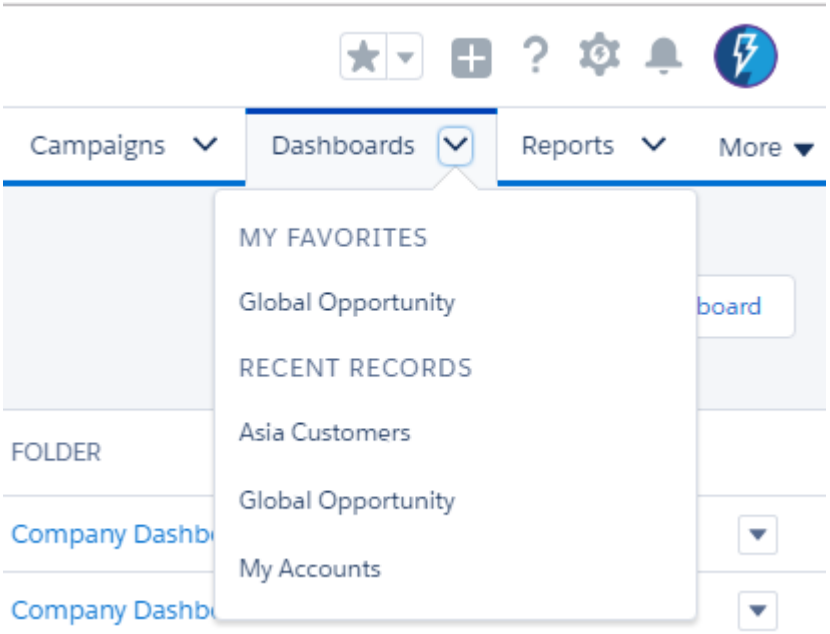

Edit Subscription
Schedule
Frequency
Daily
Weekly
Monthly
Days
SUN
MON
TUE
WED
THU
FRI
SAT
Time (Asia/Singapore)
8:00 AM
Email Results
Send To
Me
Select People
Johan Yu
Alvin Lee
Recipients see emailed report data as the person running the report. Consider that they may see more or less data than they normally see in Salesforce.
Run Report As
Me
Another Person
Cancel
Save

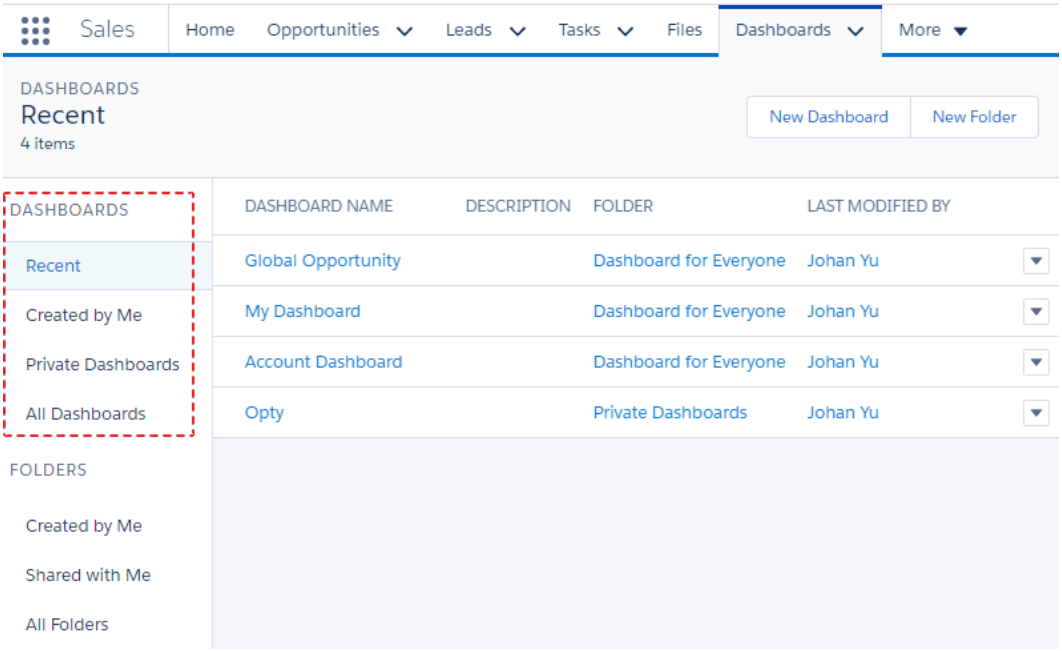
Chapter 9: Building Dashboards in Lightning Experience

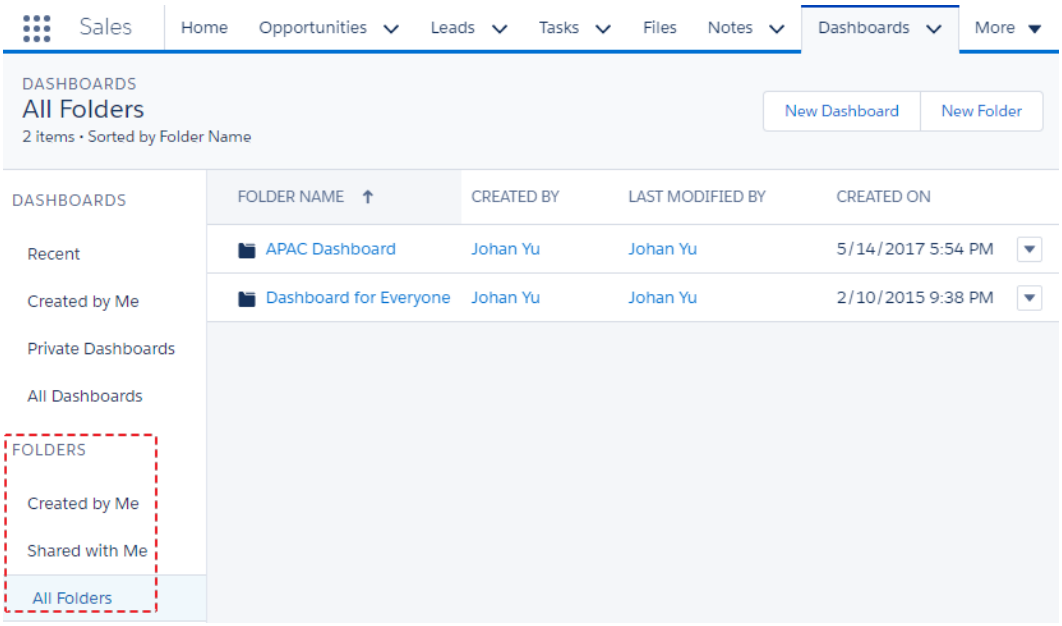


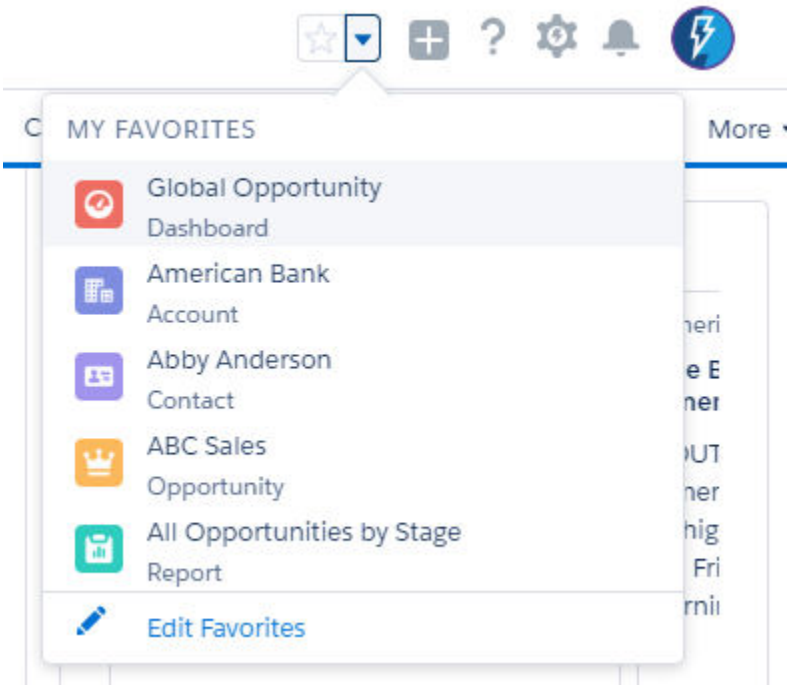

Total Pipeline
4.5M
≥ 67
View Report
This Year - Won Opportunity
500K
0
1M
View Report
Pipeline by Owner
4.5M
Opportunity Owner
Johan Yu
Alvin Lee
View Report

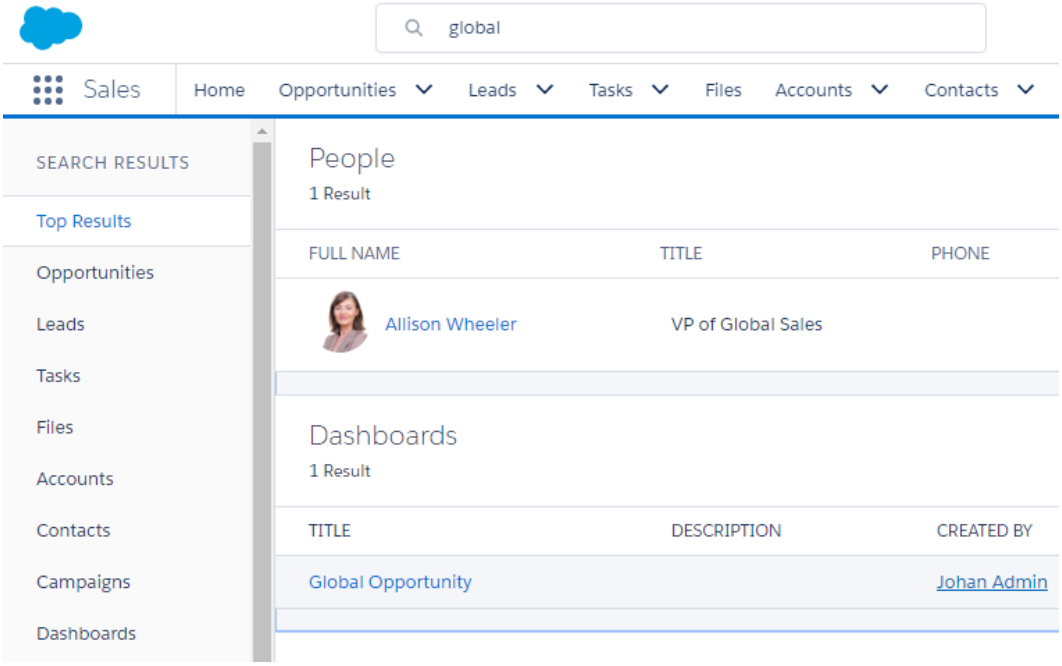

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Dashboards
More
DASHBOARDS
Recent
7 items
1
New Dashboard
New Folder
5
6
3
DASHBOARDS
Recent
2
Created by Me
Private Dashboards
All Dashboards
4
FOLDERS
Created by Me
Shared with Me
All Folders
DASHBOARD NAME
9
DESCRIPTION
FOLDER
LAST MODIFIED BY
7
8
Global Lead
This dashboard for all leads.
Company Dashboards
Alvin Lee
Opty
Private Dashboards
Johan Yu
Account Dashboard with fi...
Asia Sales
Johan Yu
Account Dashboard
Company Dashboards
Johan Yu
Account Dashboard copy
Company Dashboards
Johan Yu
Global Opportunity
Asia Sales
Johan Yu
My Dashboard
Asia Sales
Johan Yu

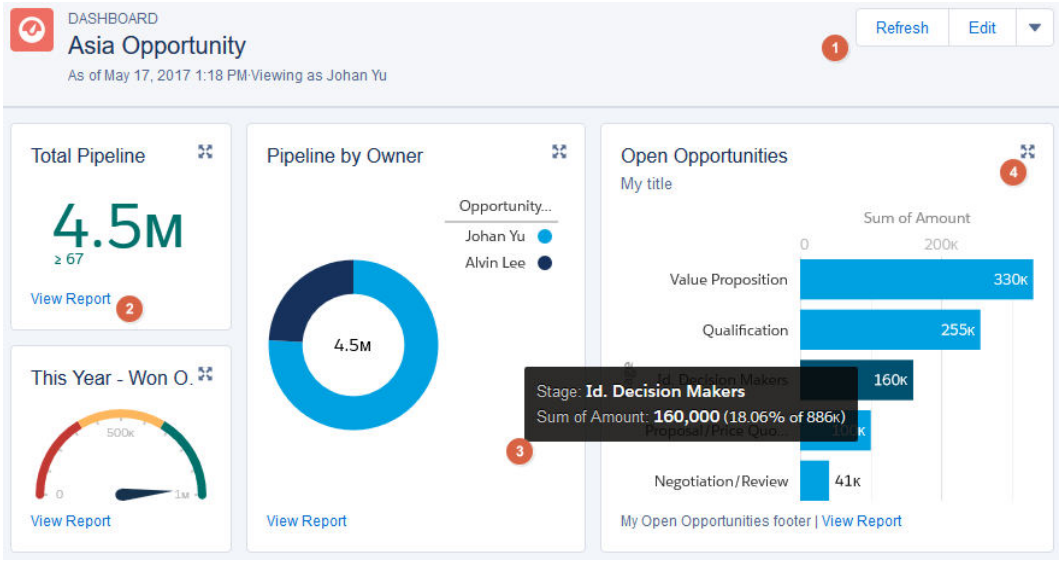

Campaigns
Dashboards
Reports
More
MY FAVORITES
Global Opportunity
RECENT RECORDS
Asia Customers
Global Opportunity
My Accounts
FOLDER
Company Dashb
Company Dashb

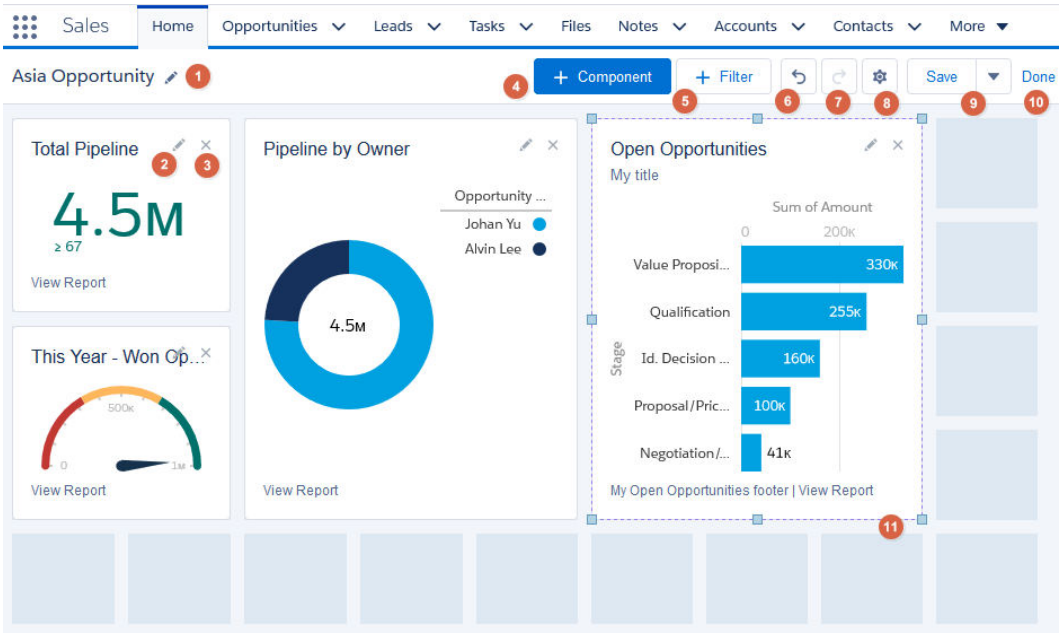

Sales
Home
Opportunities
Leads
Tasks
Files
Dashboards
More
DASHBOARDS
Recent
4 items
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
Created by Me
Shared with Me
All Folders
DASHBOARD NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
Global Opportunity
Dashboard for Everyone
Johan Yu
My Dashboard
Dashboard for Everyone
Johan Yu
Account Dashboard
Dashboard for Everyone
Johan Yu
Opty
Private Dashboards
Johan Yu

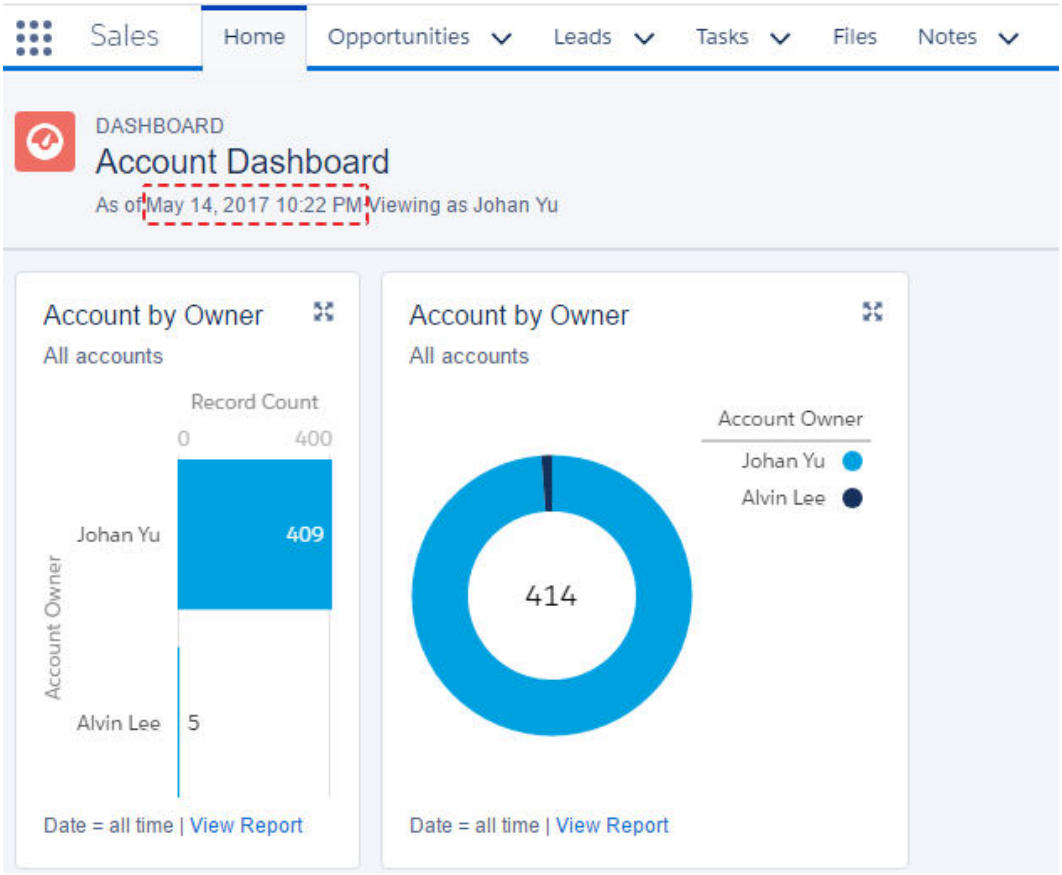

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Dashboards
More
DASHBOARDS
All Folders
2 items • Sorted by Folder Name
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
Created by Me
Shared with Me
All Folders
FOLDER NAME
CREATED BY
LAST MODIFIED BY
CREATED ON
APAC Dashboard
Johan Yu
Johan Yu
5/14/2017 5:54 PM
Dashboard for Everyone
Johan Yu
Johan Yu
2/10/2015 9:38 PM

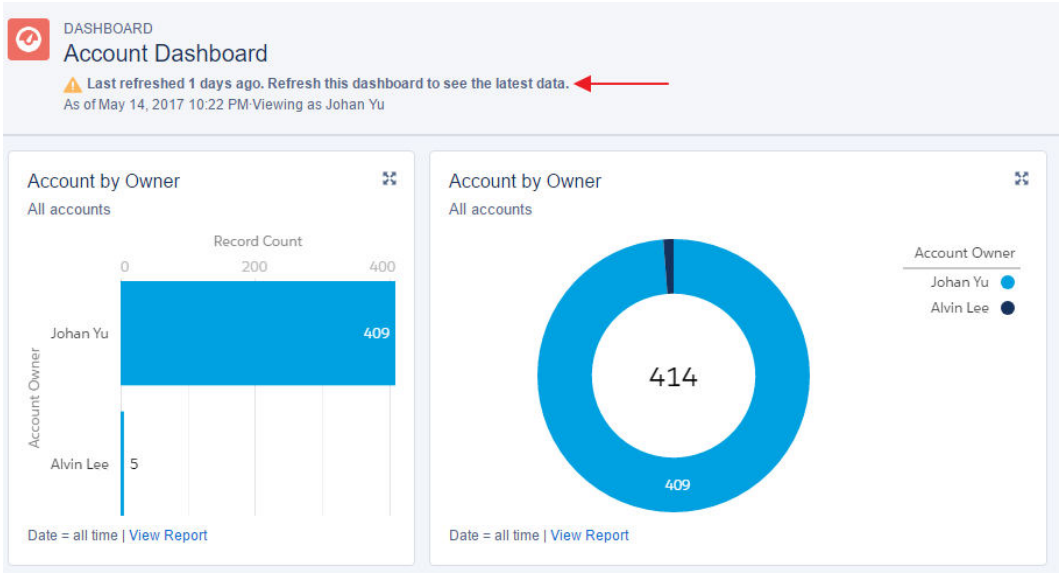

MY FAVORITES
Global Opportunity
Dashboard
American Bank
Account
Abby Anderson
Contact
ABC Sales
Opportunity
All Opportunities by Stage
Report
Edit Favorites
More

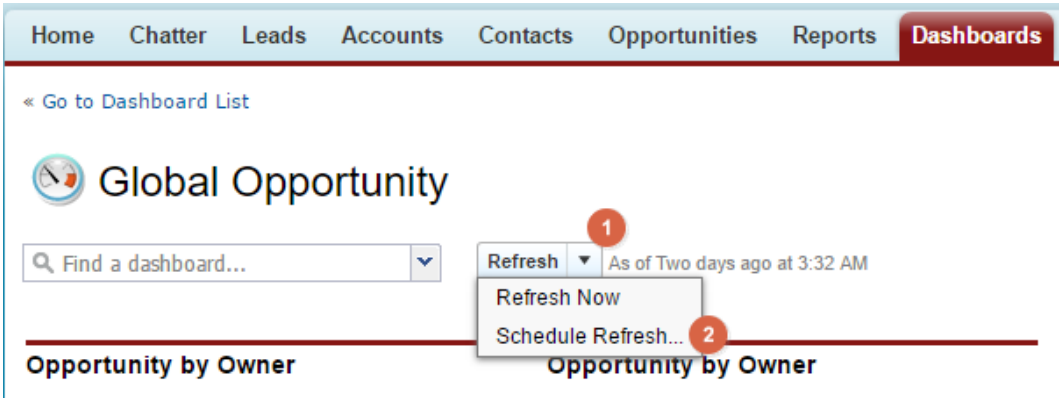

global
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
SEARCH RESULTS
Top Results
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
People
1 Result
FULL NAME
TITLE
PHONE
Allison Wheeler
VP of Global Sales
Dashboards
1 Result
TITLE
DESCRIPTION
CREATED BY
Global Opportunity
Johan Admin

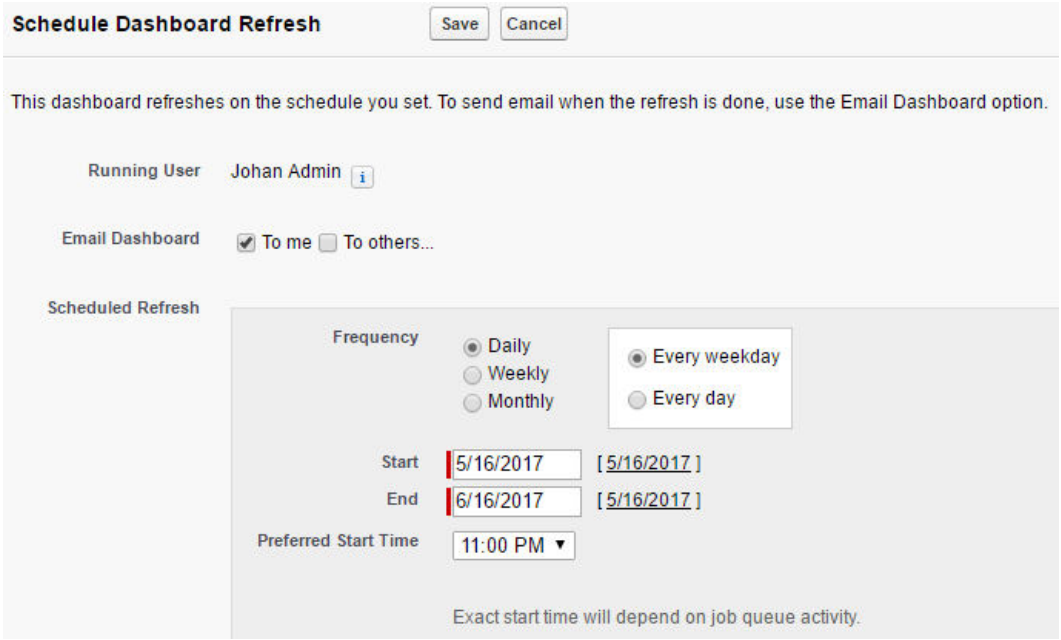

DASHBOARD
Asia Opportunity
As of May 17, 2017 1:18 PM·Viewing as Johan Yu
Refresh
Edit
1
Total Pipeline
4.5M
≥ 67
View Report
2
This Year - Won O.
View Report
Pipeline by Owner
Opportunity...
Johan Yu
Alvin Lee
4.5M
Stage: Id. Decision Makers
Sum of Amount: 160,000 (18.06% of 886K)
3
View Report
Open Opportunities
My title
4
Sum of Amount
0
200K
Value Proposition
330K
Qualification
255K
160K
Negotiation/Review
41K
My Open Opportunities footer | View Report

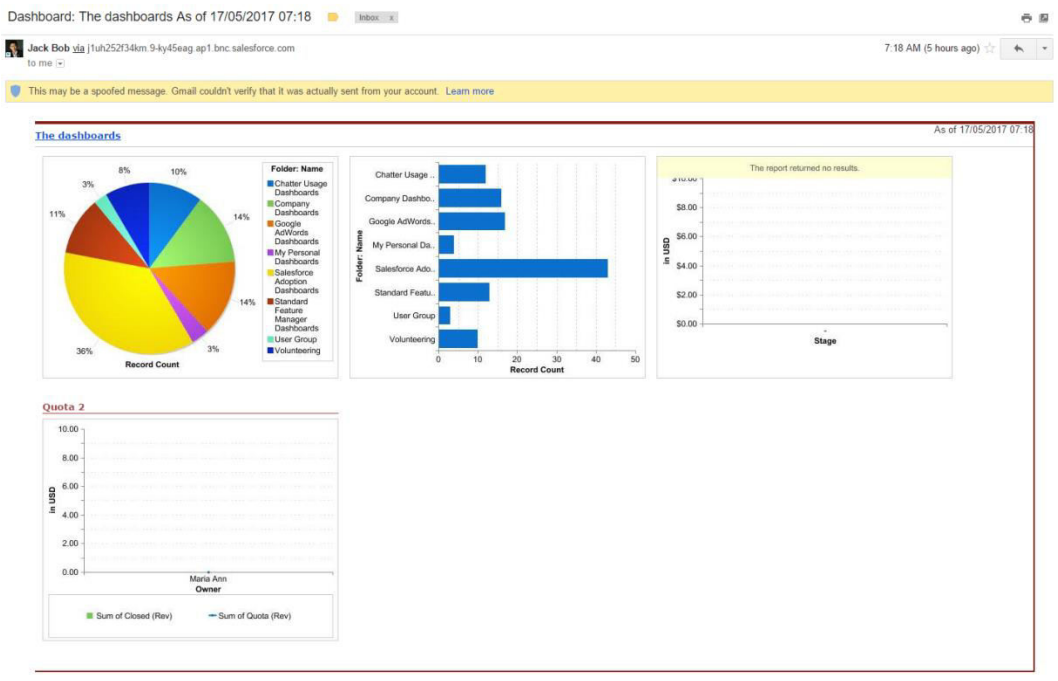

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Contacts
More
Asia Opportunity
1
Component
Filter
Save
Done
2
3
4
5
6
7
8
9
10
Total Pipeline
4.5M
≥ 67
View Report
This Year - Won Op...
500K
0
1M
View Report
Pipeline by Owner
Opportunity ...
Johan Yu
Alvin Lee
4.5M
View Report
Open Opportunities
My title
Sum of Amount
0
200K
Value Proposi...
330K
Qualification
255K
Id. Decision ...
160K
Proposal/Pric...
100K
Negotiation/...
41K
Stage
My Open Opportunities footer | View Report
11

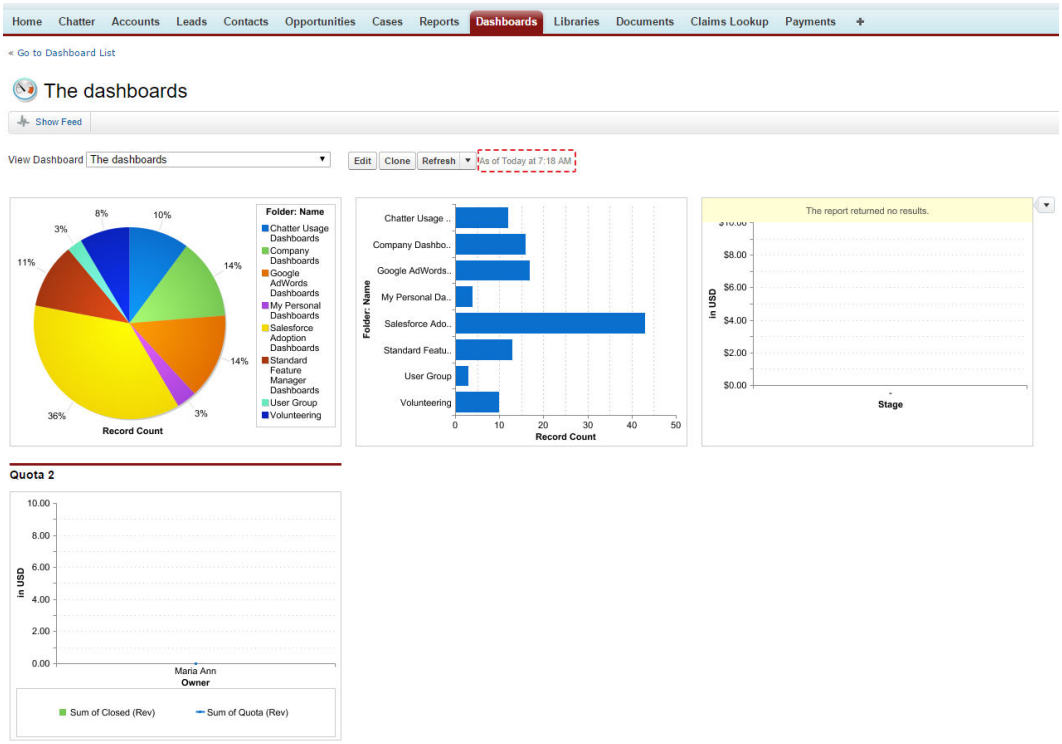

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
DASHBOARD
Account Dashboard
As of May 14, 2017 10:22 PM · Viewing as Johan Yu
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Alvin Lee
5
Account Owner
Date = all time | View Report
Account by Owner
All accounts
Account Owner
Johan Yu
Alvin Lee
414
Date = all time | View Report

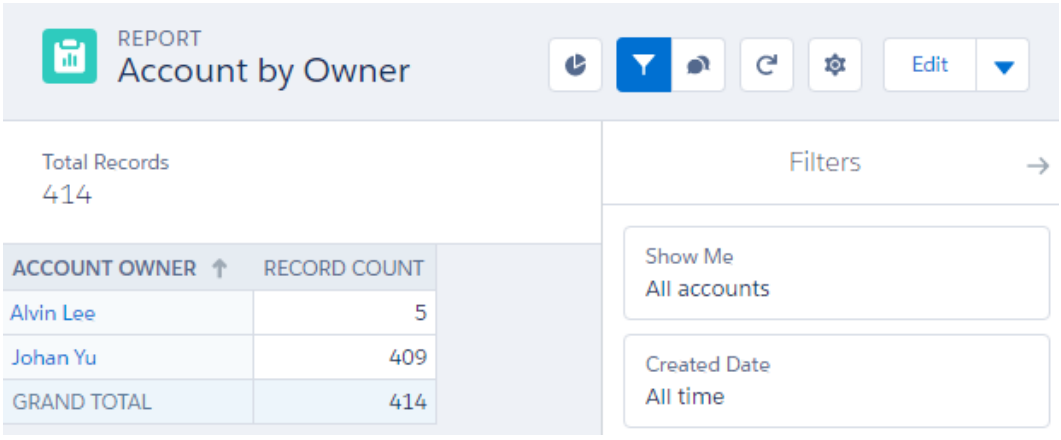

DASHBOARD
Account Dashboard
Last refreshed 1 days ago. Refresh this dashboard to see the latest data.
As of May 14, 2017 10:22 PM·Viewing as Johan Yu
Account by Owner
All accounts
Record Count
0
200
400
Account Owner
Johan Yu
409
Alvin Lee
5
Date = all time | View Report
Account by Owner
All accounts
Account Owner
Johan Yu
Alvin Lee
414
409
Date = all time | View Report

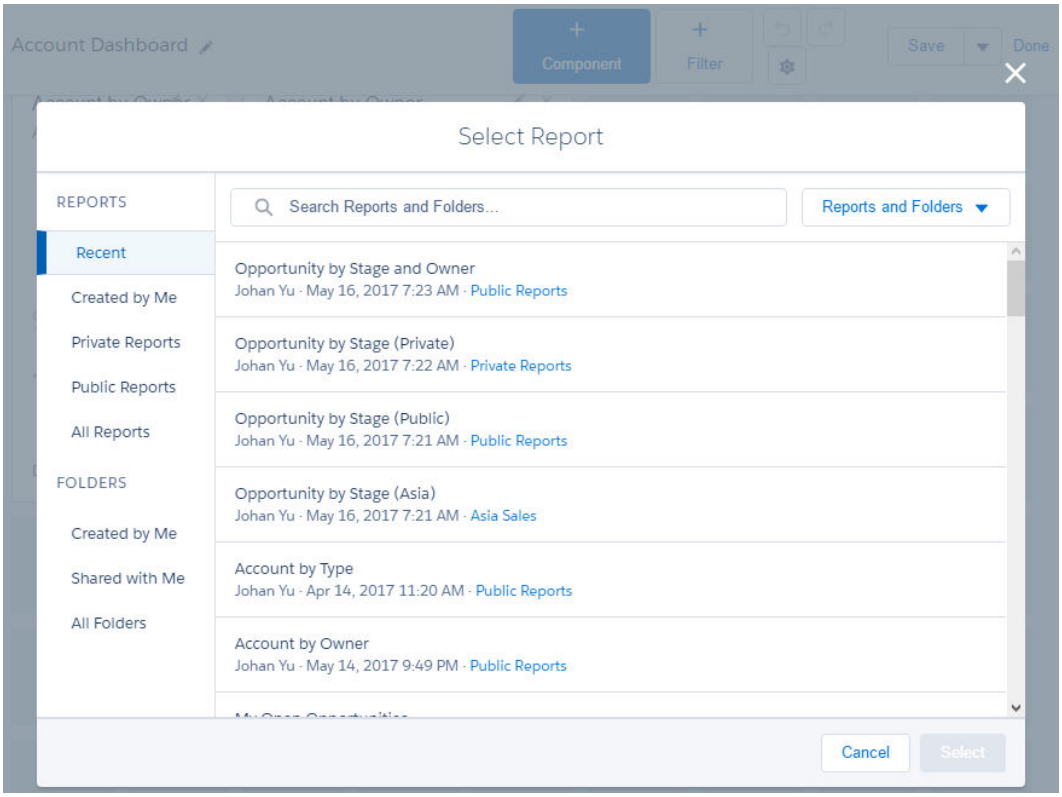

Home
Chatter
Leads
Accounts
Contacts
Opportunities
Reports
Dashboards
« Go to Dashboard List
Global Opportunity
Find a dashboard...
Refresh
1
As of Two days ago at 3:32 AM
Refresh Now
Schedule Refresh...
2
Opportunity by Owner
Opportunity by Owner

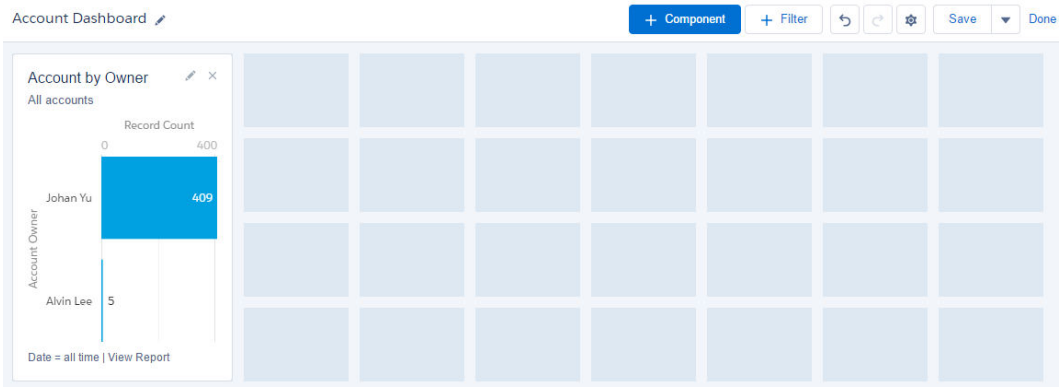

Schedule Dashboard Refresh
Save
Cancel
This dashboard refreshes on the schedule you set. To send email when the refresh is done, use the Email Dashboard option.
Running User
Johan Admin
Email Dashboard
To me
To others...
Scheduled Refresh
Frequency
Daily
Weekly
Monthly
Every weekday
Every day
Start
5/16/2017
[5/16/2017]
End
6/16/2017
[5/16/2017]
Preferred Start Time
11:00 PM
Exact start time will depend on job queue activity.

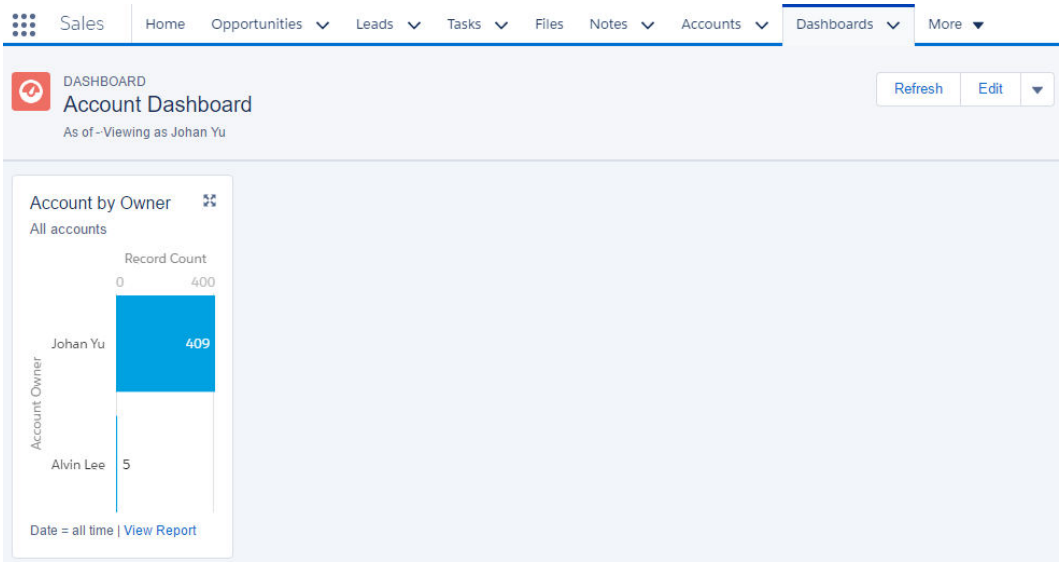

Dashboard: The dashboards As of 17/05/2017 07:18
Jack Bob via j1uh252f34km.9-ky45eag.ap1.bnc.salesforce.com
to me
7:18 AM (5 hours ago)
This may be a spoofed message. Gmail couldn't verify that it was actually sent from your account. Learn more
The dashboards
As of 17/05/2017 07:18
Folder: Name
Chatter Usage Dashboards
Company Dashboards
Google AdWords Dashboards
My Personal Dashboards
Salesforce Adoption Dashboards
Standard Feature Manager Dashboards
User Group
Volunteering
Record Count
The report returned no results.
in USD
Stage
Quota 2
Maria Ann
Owner
Sum of Closed (Rev)
Sum of Quota (Rev)

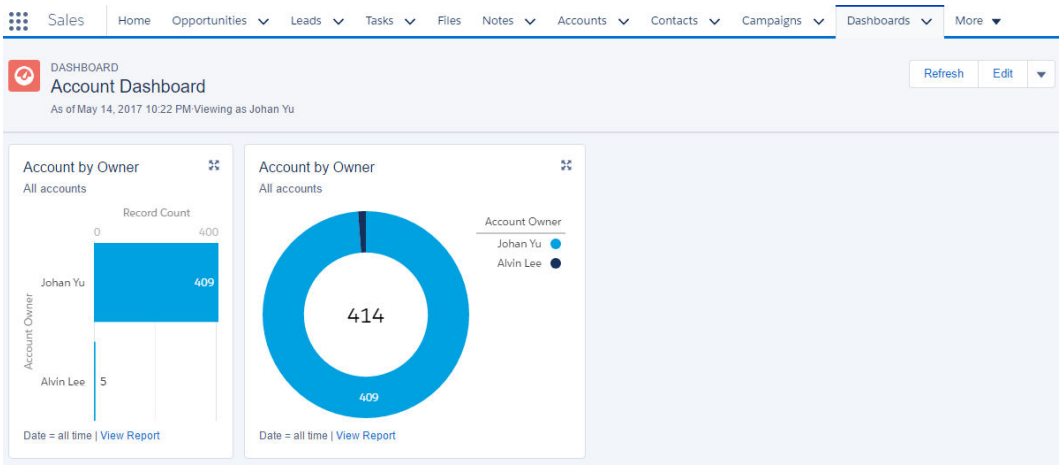

Home
Chatter
Accounts
Leads
Contacts
Opportunities
Cases
Reports
Dashboards
Libraries
Documents
Claims Lookup
Payments
« Go to Dashboard List
The dashboards
Show Feed
View Dashboard
The dashboards
Edit
Clone
Refresh
As of Today at 7:18 AM
Folder: Name
Chatter Usage Dashboards
Company Dashboards
Google AdWords Dashboards
My Personal Dashboards
Salesforce Adoption Dashboards
Standard Feature Manager Dashboards
User Group
Volunteering
10%
14%
14%
3%
36%
11%
3%
8%
Record Count
Chatter Usage..
Company Dashbo..
Google AdWords..
My Personal Da..
Salesforce Ado..
Standard Featu..
User Group
Volunteering
Folder: Name
0
10
20
30
40
50
Record Count
The report returned no results.
in USD
$8.00
$6.00
$4.00
$2.00
$0.00
Stage
Quota 2
10.00
8.00
6.00
4.00
2.00
0.00
in USD
Maria Ann
Owner
Sum of Closed (Rev)
Sum of Quota (Rev)

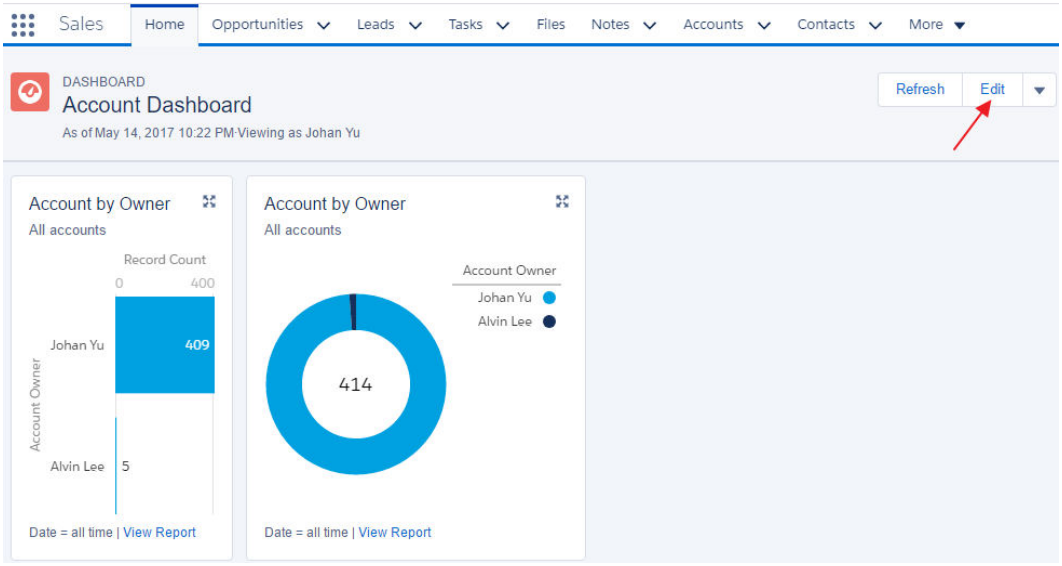

REPORT
Account by Owner
Edit
Total Records
414
Filters
ACCOUNT OWNER
RECORD COUNT
Alvin Lee
5
Johan Yu
409
GRAND TOTAL
414
Show Me
All accounts
Created Date
All time

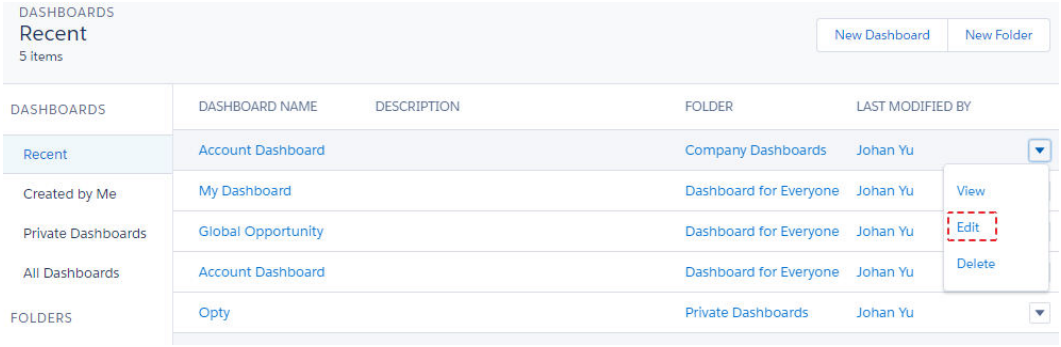

Account Dashboard
Component
Filter
Save
Done
Select Report
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
Search Reports and Folders...
Reports and Folders
Opportunity by Stage and Owner
Johan Yu · May 16, 2017 7:23 AM · Public Reports
Opportunity by Stage (Private)
Johan Yu · May 16, 2017 7:22 AM · Private Reports
Opportunity by Stage (Public)
Johan Yu · May 16, 2017 7:21 AM · Public Reports
Opportunity by Stage (Asia)
Johan Yu · May 16, 2017 7:21 AM · Asia Sales
Account by Type
Johan Yu · Apr 14, 2017 11:20 AM · Public Reports
Account by Owner
Johan Yu · May 14, 2017 9:49 PM · Public Reports
Cancel
Select

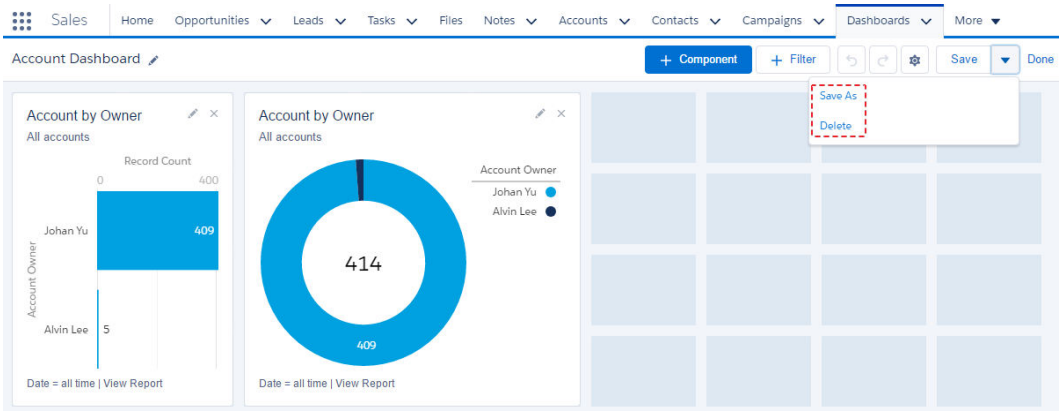

Account Dashboard
+ Component
+ Filter
Save
Done
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Alvin Lee
5
Account Owner
Date = all time | View Report

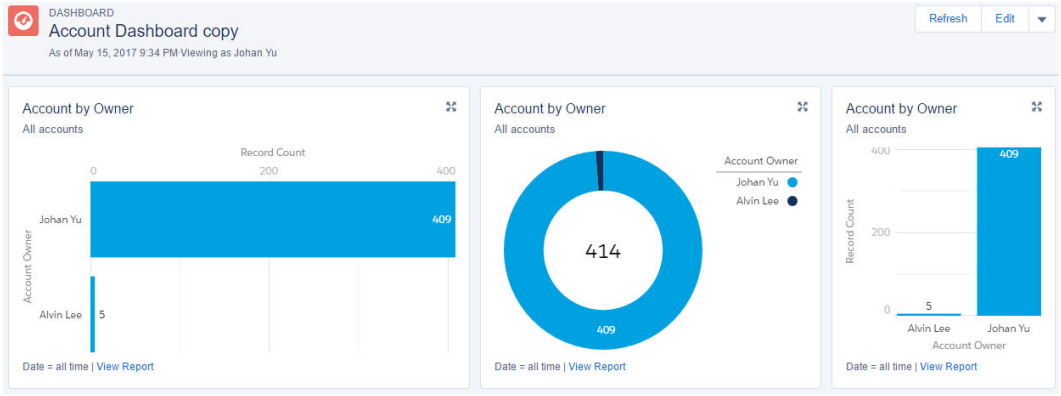

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Dashboards
More
DASHBOARD
Account Dashboard
As of -·Viewing as Johan Yu
Refresh
Edit
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Account Owner
Alvin Lee
5
Date = all time | View Report

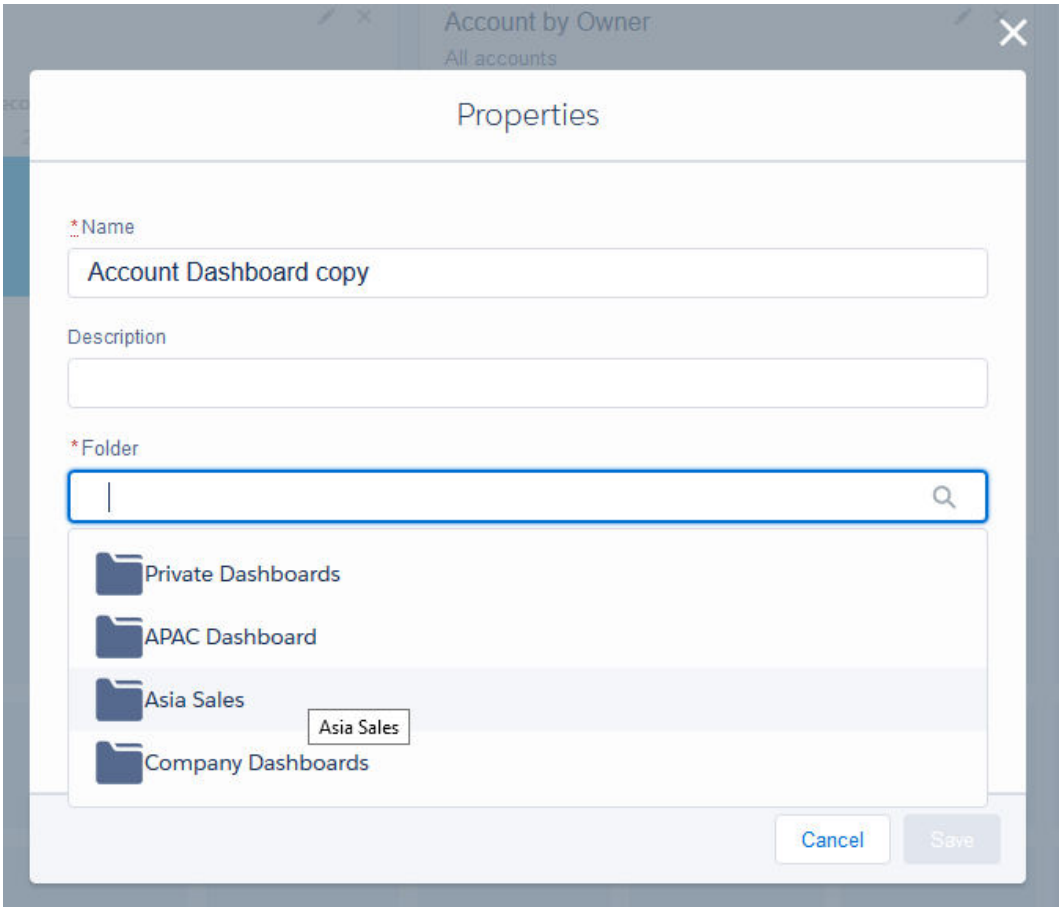

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Contacts
Campaigns
Dashboards
More
DASHBOARD
Account Dashboard
As of May 14, 2017 10:22 PM·Viewing as Johan Yu
Refresh
Edit
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Account Owner
Alvin Lee
5
Date = all time | View Report
Account by Owner
All accounts
Account Owner
Johan Yu
Alvin Lee
414
409
Date = all time | View Report

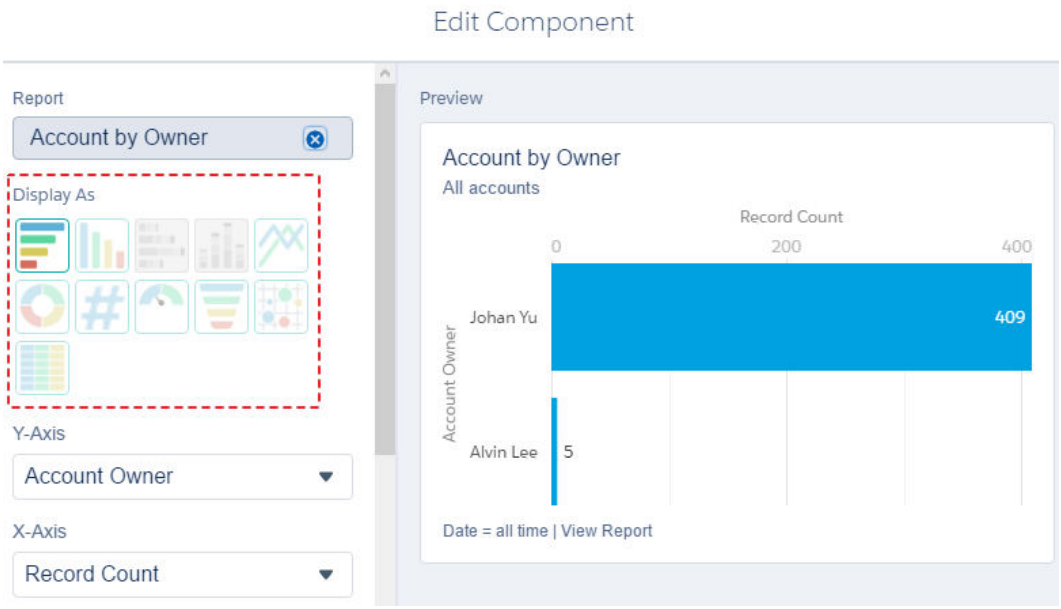

Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Contacts
More
DASHBOARD
Account Dashboard
As of May 14, 2017 10:22 PM·Viewing as Johan Yu
Refresh
Edit
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Alvin Lee
5
Account Owner
Date = all time | View Report
Account by Owner
All accounts
Account Owner
Johan Yu
Alvin Lee
414
Date = all time | View Report

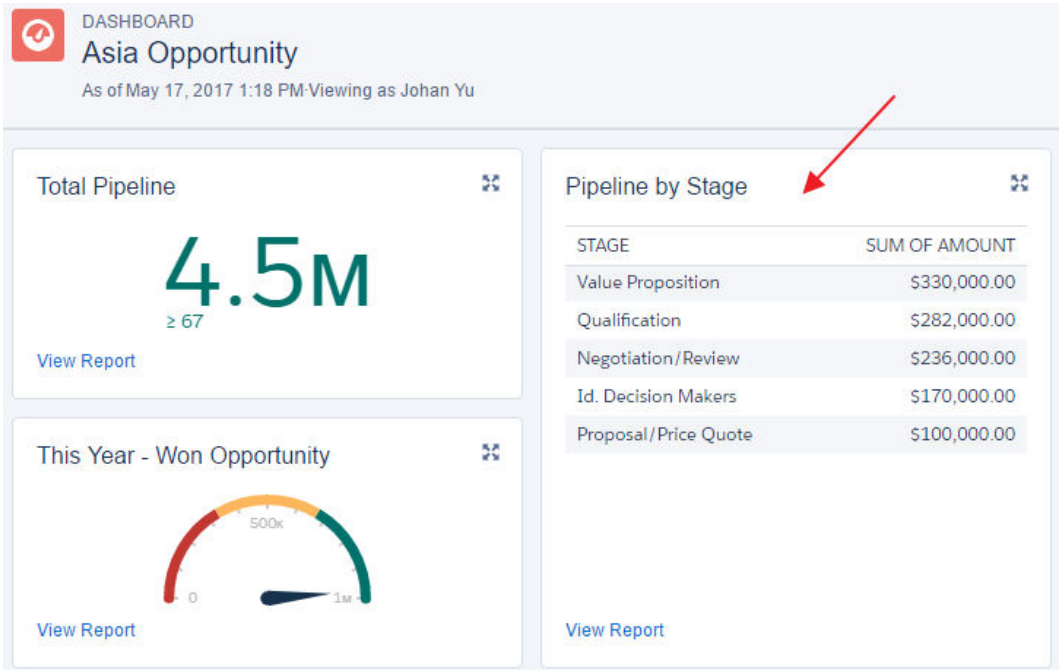

DASHBOARDS
Recent
5 items
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
DASHBOARD NAME
DESCRIPTION
FOLDER
LAST MODIFIED BY
Account Dashboard
Company Dashboards
Johan Yu
My Dashboard
Dashboard for Everyone
Johan Yu
Global Opportunity
Dashboard for Everyone
Johan Yu
Account Dashboard
Dashboard for Everyone
Johan Yu
Opty
Private Dashboards
Johan Yu
View
Edit
Delete


Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Contacts
Campaigns
Dashboards
More
Account Dashboard
Component
Filter
Save
Done
Save As
Delete
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Alvin Lee
5
Account Owner
Date = all time | View Report
Account by Owner
All accounts
414
409
Account Owner
Johan Yu
Alvin Lee
Date = all time | View Report


DASHBOARD
Account Dashboard copy
As of May 15, 2017 9:34 PM·Viewing as Johan Yu
Refresh
Edit
Account by Owner
All accounts
Record Count
0
200
400
Johan Yu
409
Alvin Lee
5
Account Owner
Date = all time | View Report
Account by Owner
All accounts
414
409
Account Owner
Johan Yu
Alvin Lee
Date = all time | View Report
Account by Owner
All accounts
400
200
0
409
5
Record Count
Alvin Lee
Johan Yu
Account Owner
Date = all time | View Report


Account by Owner
All accounts
Properties
*Name
Account Dashboard copy
Description
*Folder
Private Dashboards
APAC Dashboard
Asia Sales
Asia Sales
Company Dashboards
Cancel
Save


Edit Component
Report
Account by Owner
Display As
Y-Axis
Account Owner
X-Axis
Record Count
Preview
Account by Owner
All accounts
Record Count
0
200
400
Account Owner
Johan Yu
409
Alvin Lee
5
Date = all time | View Report


DASHBOARD
Asia Opportunity
As of May 17, 2017 1:18 PM·Viewing as Johan Yu
Total Pipeline
4.5M
≥ 67
View Report
This Year - Won Opportunity
500k
0
1M
View Report
Pipeline by Stage
STAGE
SUM OF AMOUNT
Value Proposition
$330,000.00
Qualification
$282,000.00
Negotiation/Review
$236,000.00
Id. Decision Makers
$170,000.00
Proposal/Price Quote
$100,000.00
View Report

DASHBOARD

Asia Opportunity

As of May 17, 2017 1:18 PM·Viewing as Johan Yu

Pipeline by Stage

STAGE	SUM OF AMOUNT
Value Proposition	$330,000.00
Qualification	$282,000.00
Negotiation/Review	$236,000.00
Id. Decision Makers	$170,000.00
Proposal/Price Quote	$100,000.00

View Report

Pipeline by Stage and Owner

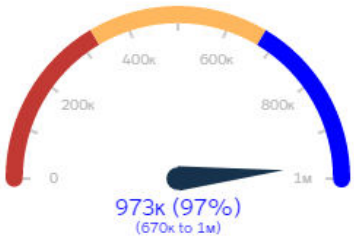
View Report

DASHBOARD

Asia Opportunity

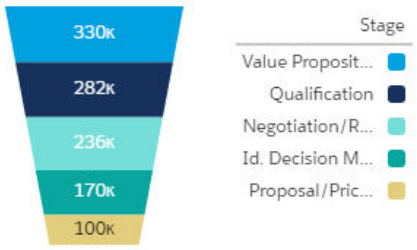
As of May 17, 2017 9:58 PM·Viewing as Johan Yu

This Year - Won Opportunity



View Report

Pipeline by Stage and Owner



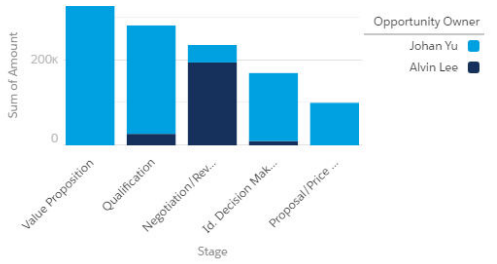
View Report

DASHBOARD

Asia Opportunity

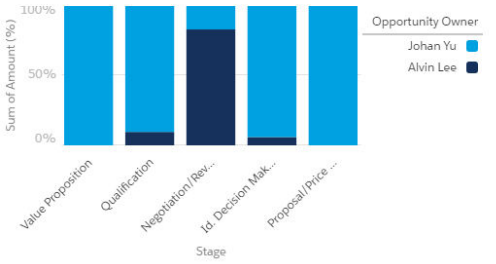
As of May 17, 2017 9:58 PM·Viewing as Johan Yu

Pipeline by Stage and Owner



View Report

Pipeline by Stage and Owner



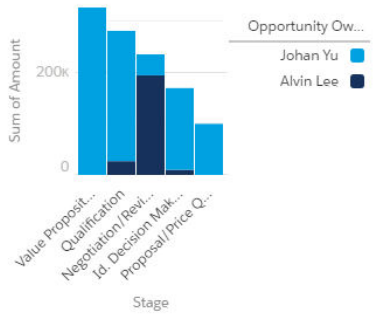
View Report

DASHBOARD

Asia Opportunity

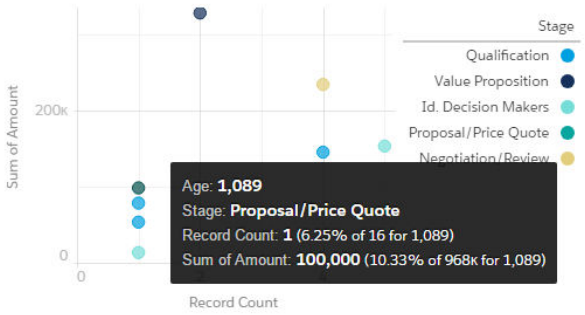
As of May 17, 2017 9:58 PM·Viewing as Johan Yu

Pipeline by Stage and Owner



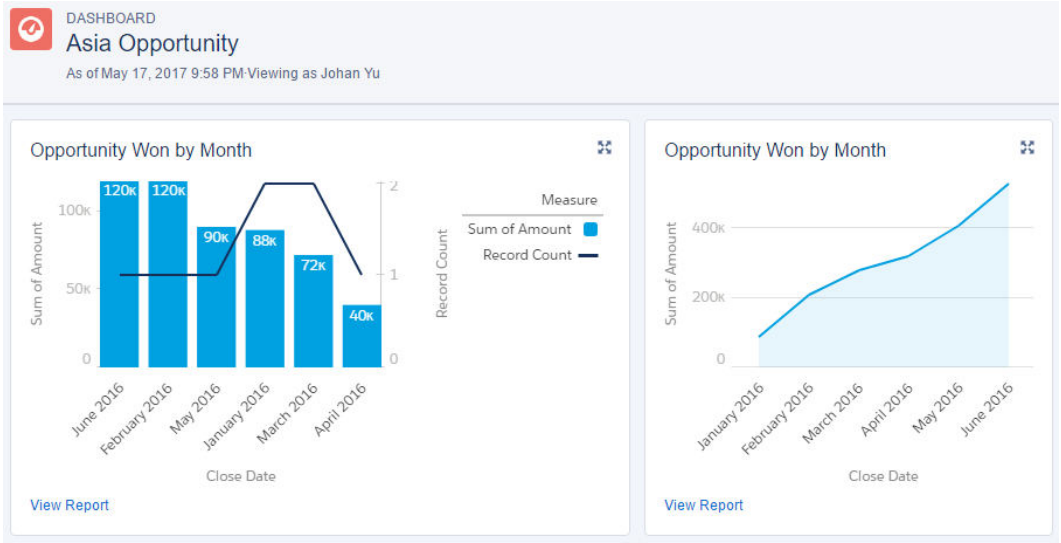
View Report

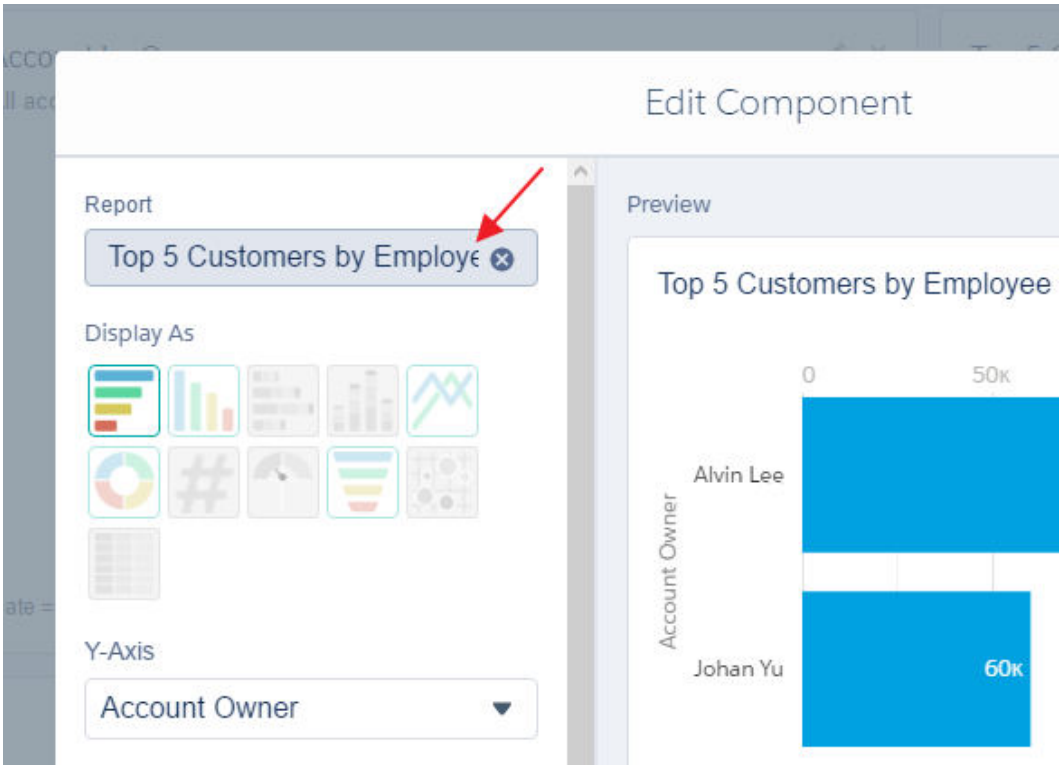
Pipeline by Stage and Age



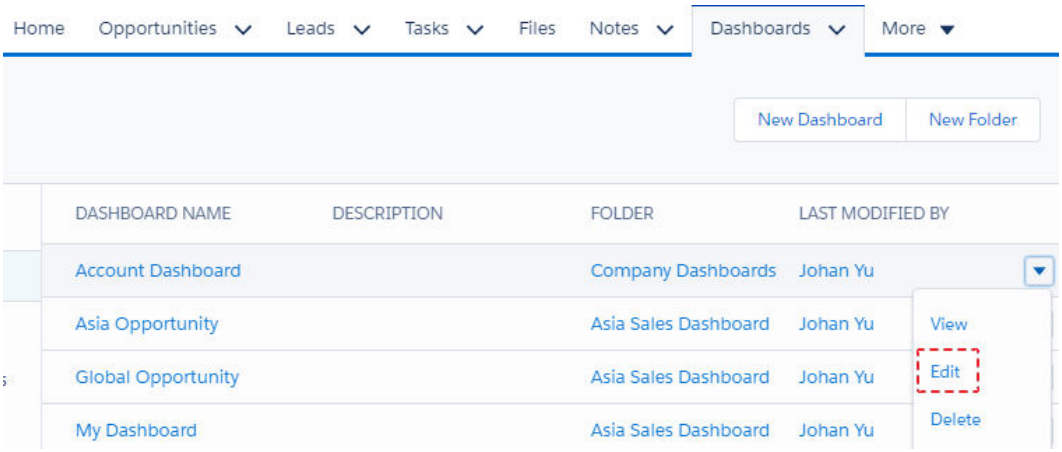
View Report

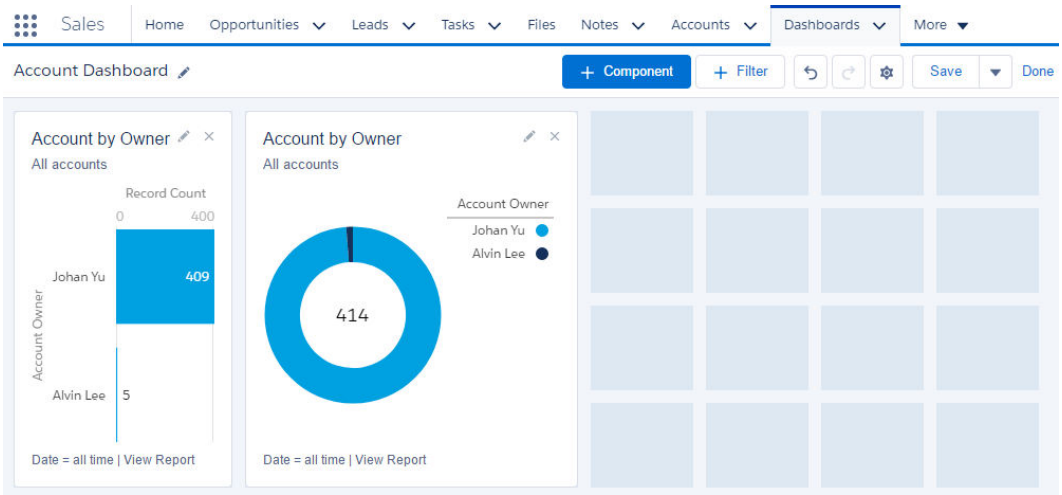
DASHBOARD
Asia Opportunity
As of May 17, 2017 9:58 PM·Viewing as Johan Yu
Opportunity Won by Month
Sum of Amount
400K
200K
0
January 2016
February 2016
March 2016
April 2016
May 2016
June 2016
Close Date
View Report
Pipeline by Stage and Age
Sum of Amount
200K
0
0
5
Record Count
Stage
Qualification
Value Proposit...
Id. Decision M...
Proposal/Pric...
Negotiation/R...
View Report

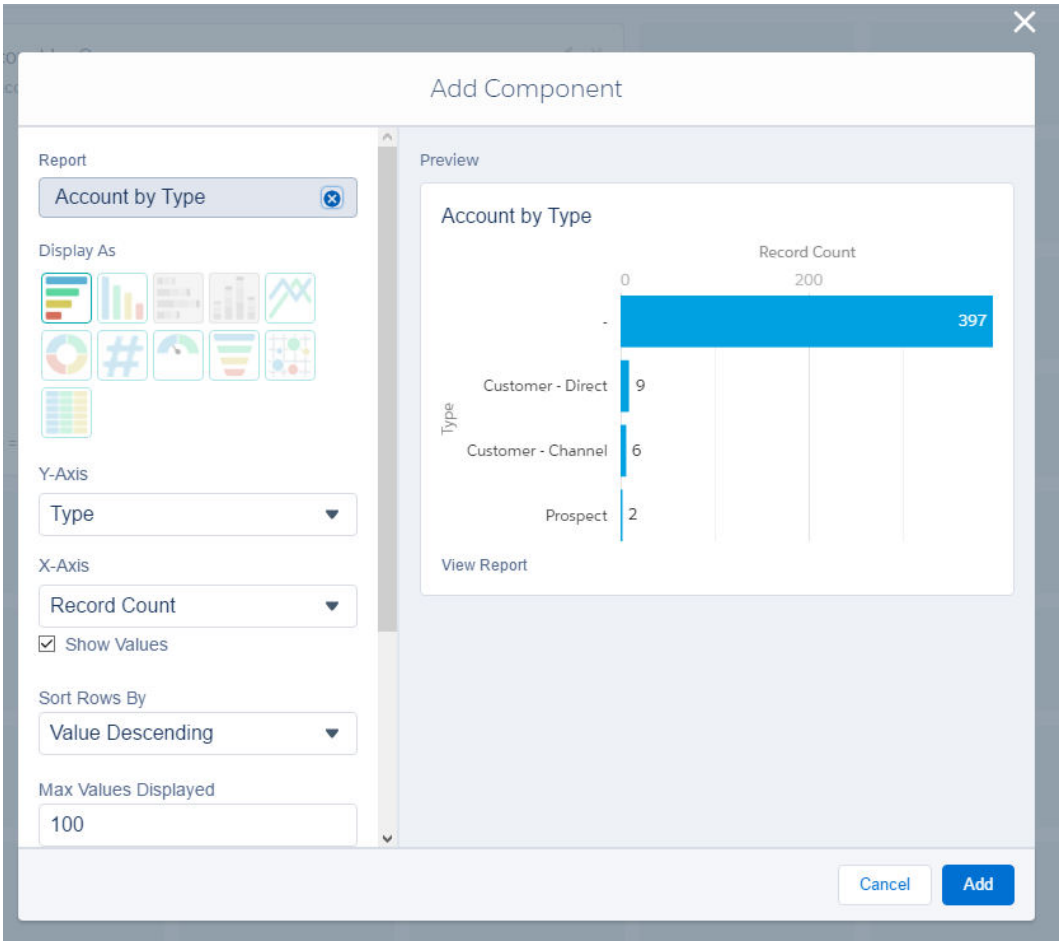

DASHBOARD
Asia Opportunity
As of May 17, 2017 9:58 PM·Viewing as Johan Yu
Opportunity Won by Month
Sum of Amount
100K
50K
0
120K
120K
90K
88K
72K
40K
2
1
0
Record Count
June 2016
February 2016
May 2016
January 2016
March 2016
April 2016
Close Date
Measure
Sum of Amount
Record Count
View Report
Opportunity Won by Month
Sum of Amount
400K
200K
0
January 2016
February 2016
March 2016
April 2016
May 2016
June 2016
Close Date
View Report

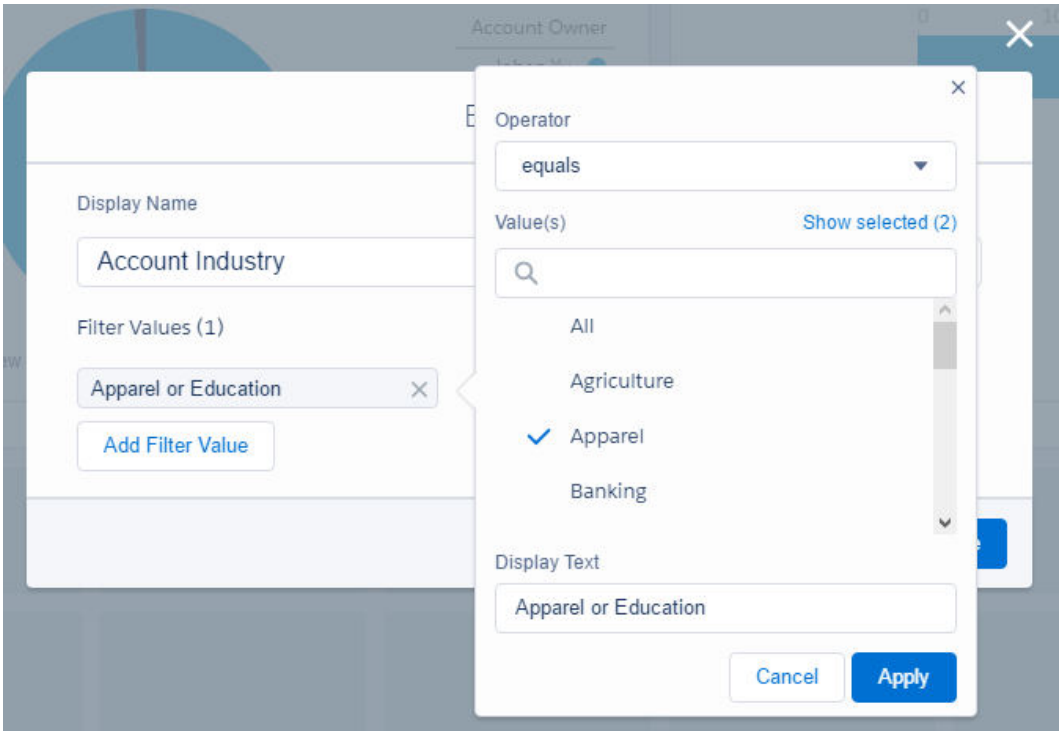

Edit Component
Report
Top 5 Customers by Employe
Display As
Y-Axis
Account Owner
Preview
Top 5 Customers by Employee
0
50K
Alvin Lee
Johan Yu
60K
Account Owner

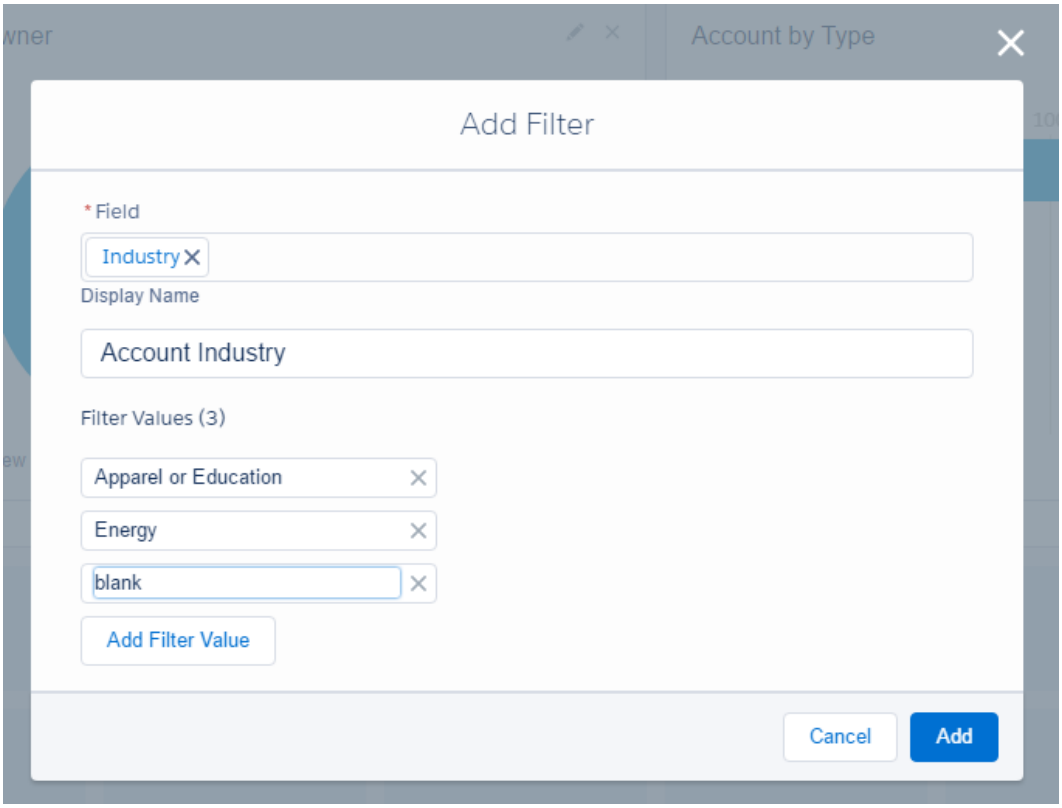
Chapter 10: Learning Advanced Dashboard Configuration

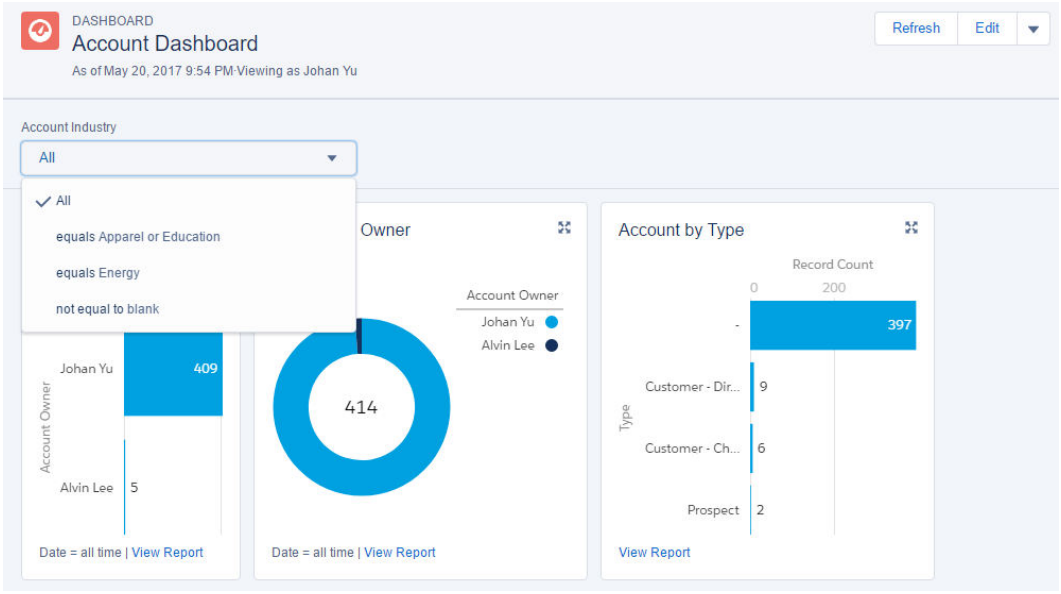


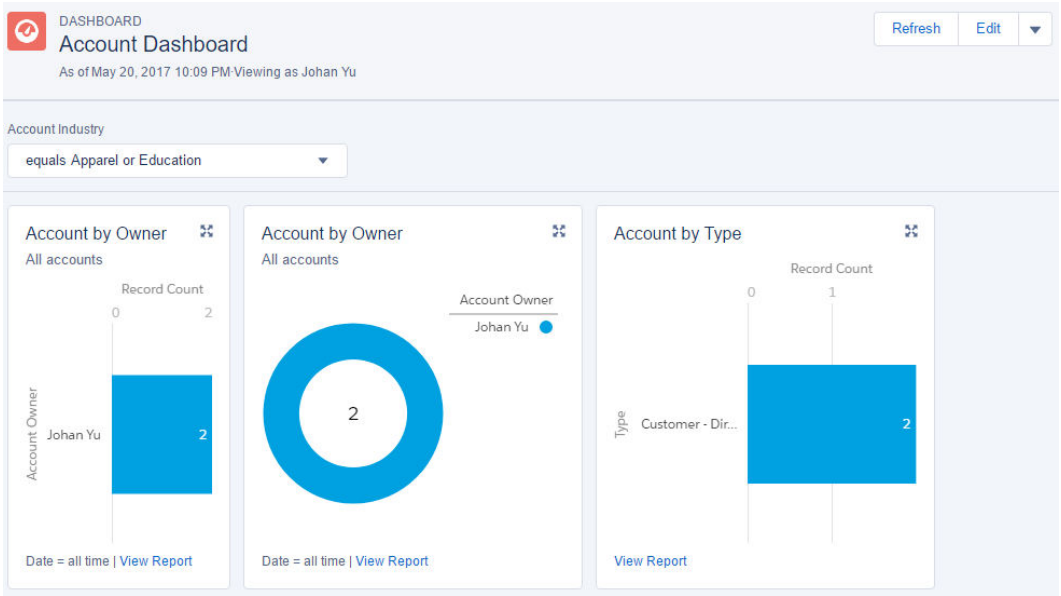


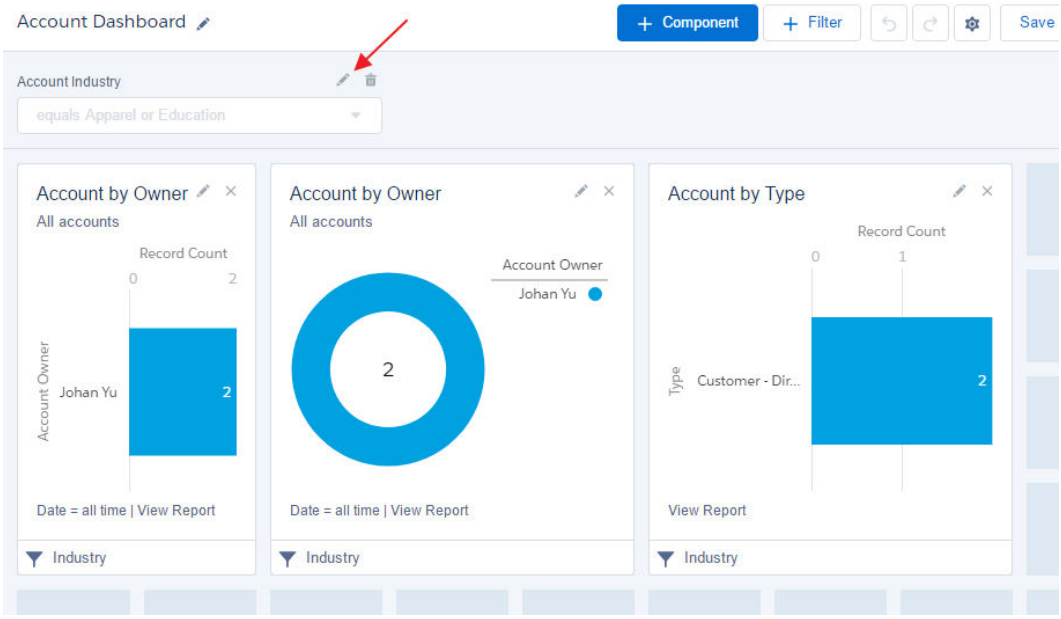

Add Component
Report
Account by Type
Display As
Y-Axis
Type
X-Axis
Record Count
Show Values
Sort Rows By
Value Descending
Max Values Displayed
100
Preview
Account by Type
Record Count
0
200
397
Customer - Direct
9
Customer - Channel
6
Prospect
2
Type
View Report
Cancel
Add

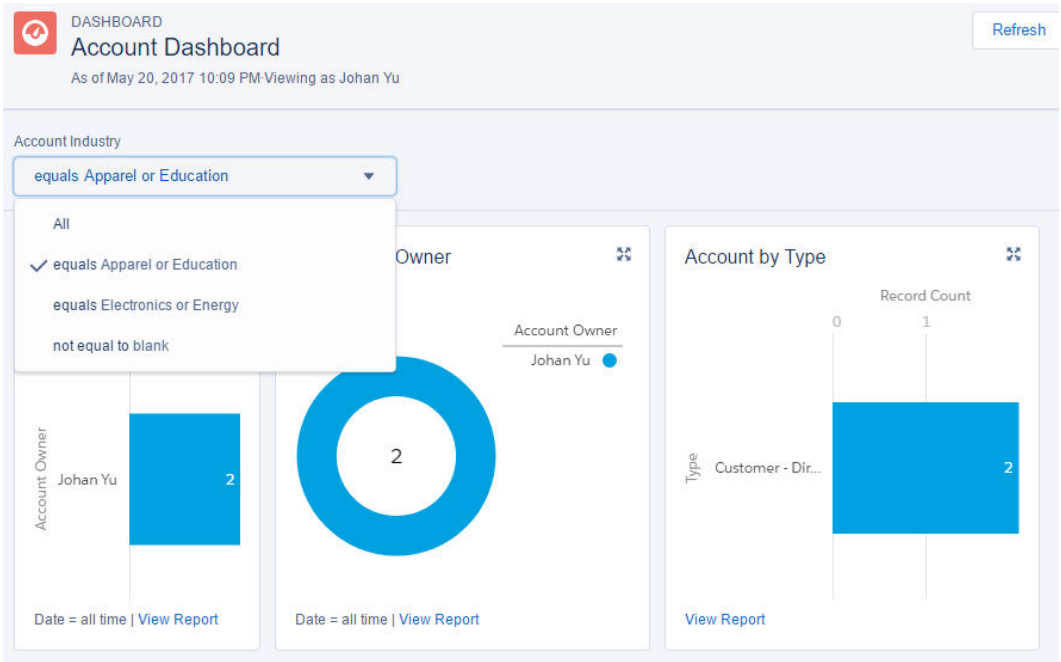

Account Owner
Display Name
Account Industry
Filter Values (1)
Apparel or Education
Add Filter Value
Operator
equals
Value(s)
Show selected (2)
All
Agriculture
Apparel
Banking
Display Text
Apparel or Education
Cancel
Apply

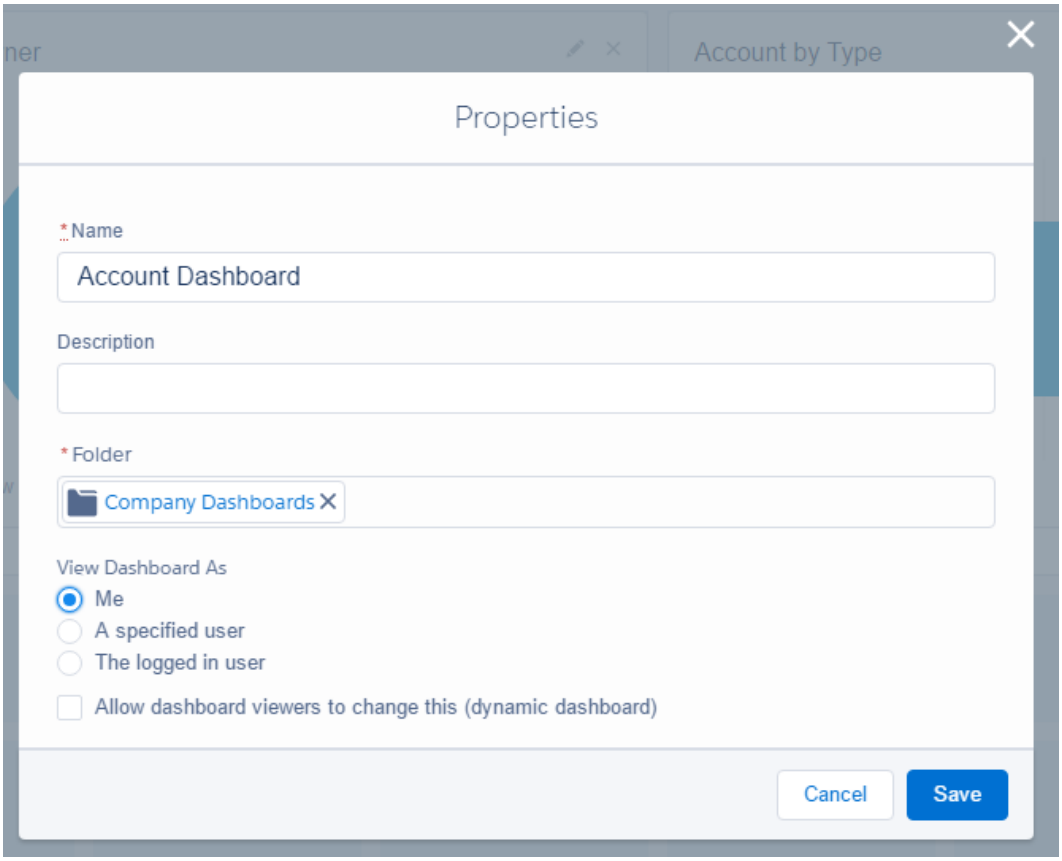

Account by Type
Add Filter
* Field
Industry
Display Name
Account Industry
Filter Values (3)
Apparel or Education
Energy
blank
Add Filter Value
Cancel
Add

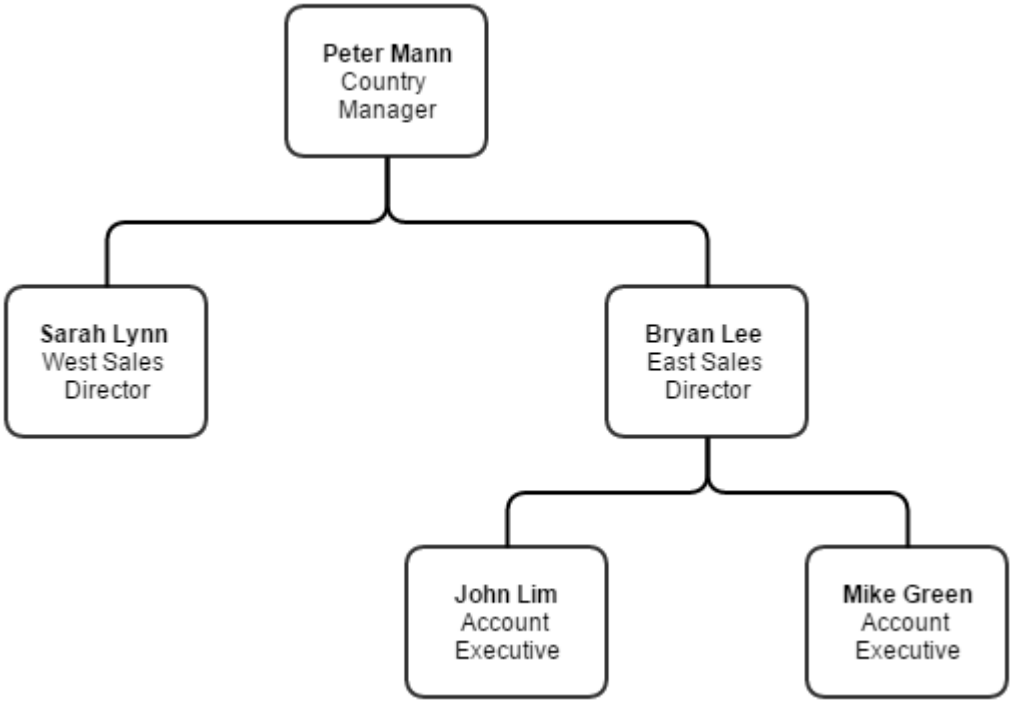

DASHBOARD
Account Dashboard
As of May 20, 2017 9:54 PM·Viewing as Johan Yu
Refresh
Edit
Account Industry
All
All
equals Apparel or Education
equals Energy
not equal to blank
Owner
Account Owner
Johan Yu
Alvin Lee
414
Johan Yu
409
Alvin Lee
5
Date = all time | View Report
Date = all time | View Report
Account by Type
Record Count
0
200
397
Customer - Dir...
9
Customer - Ch...
6
Prospect
2
Type
View Report

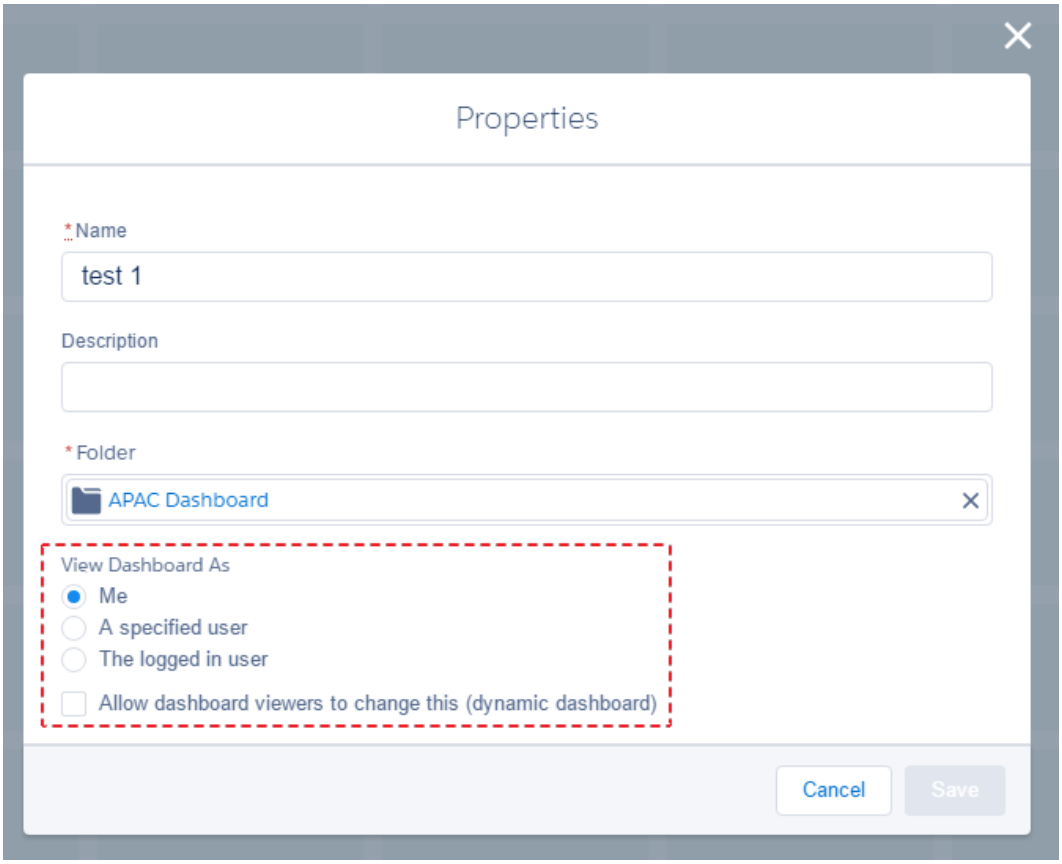

DASHBOARD
Account Dashboard
As of May 20, 2017 10:09 PM·Viewing as Johan Yu
Refresh
Edit
Account Industry
equals Apparel or Education
Account by Owner
All accounts
Record Count
0
2
Account Owner
Johan Yu
2
Account by Owner
All accounts
Account Owner
Johan Yu
2
Account by Type
Record Count
0
1
Type
Customer - Dir...
2
Date = all time | View Report
Date = all time | View Report
View Report

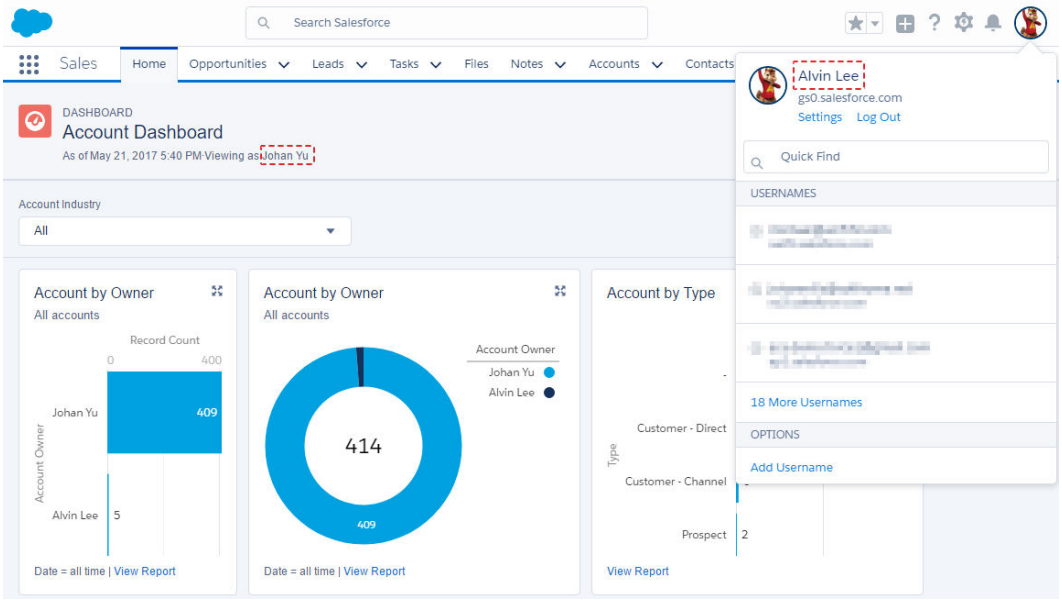

Account Dashboard
+ Component
+ Filter
Save
Account Industry
equals Apparel or Education
Account by Owner
All accounts
Record Count
0
2
Account Owner
Johan Yu
2
Date = all time | View Report
Industry
Account by Owner
All accounts
Account Owner
Johan Yu
2
Date = all time | View Report
Industry
Account by Type
Record Count
0
1
Type
Customer - Dir...
2
View Report
Industry

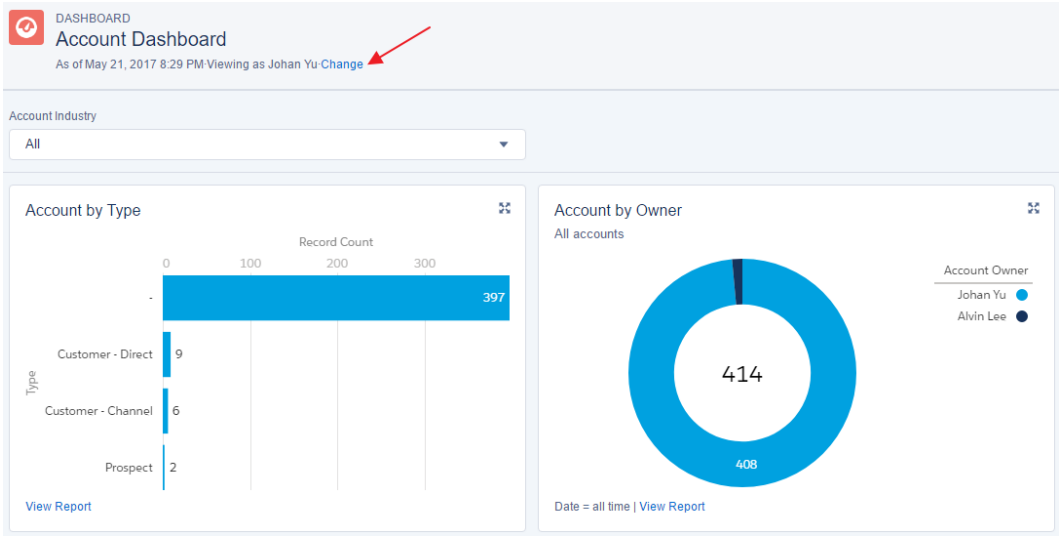

DASHBOARD
Account Dashboard
As of May 20, 2017 10:09 PM·Viewing as Johan Yu
Refresh
Account Industry
equals Apparel or Education
All
equals Apparel or Education
equals Electronics or Energy
not equal to blank
Owner
Account Owner
Johan Yu
2
Date = all time | View Report
Account by Type
Record Count
0
1
Type
Customer - Dir...
2
View Report

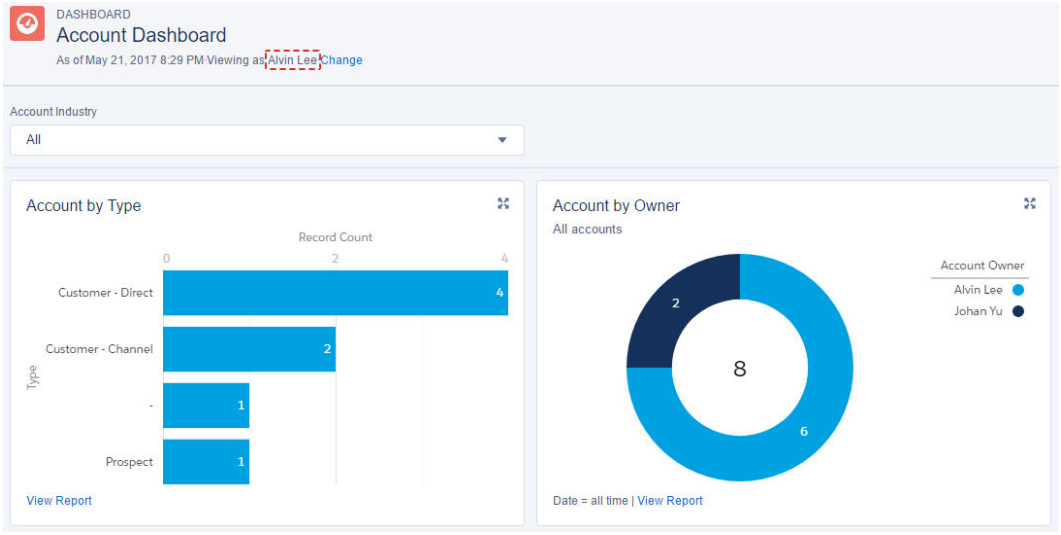

Account by Type
Properties
*Name
Account Dashboard
Description
*Folder
Company Dashboards
View Dashboard As
Me
A specified user
The logged in user
Allow dashboard viewers to change this (dynamic dashboard)
Cancel
Save

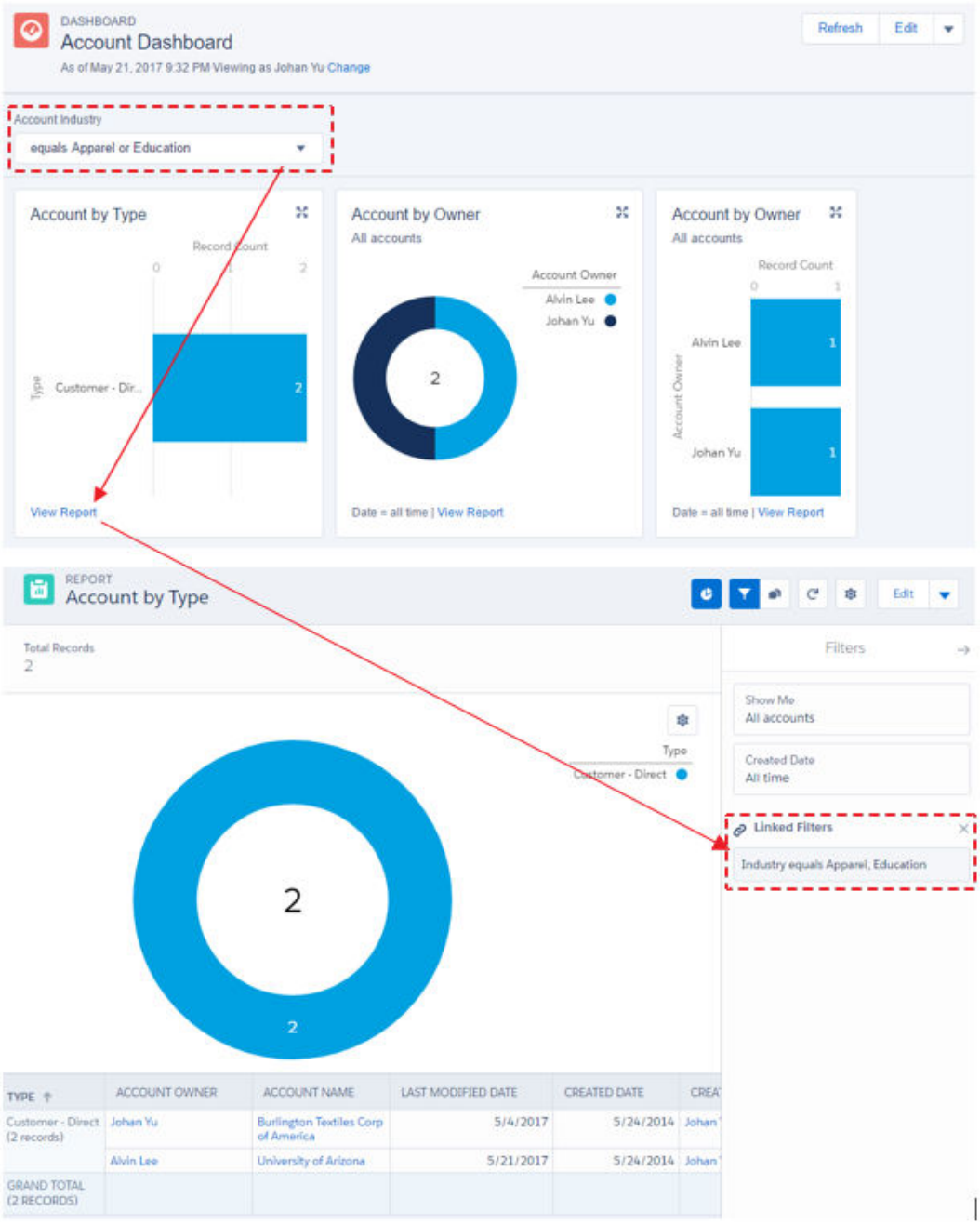

Peter Mann
Country Manager
Sarah Lynn
West Sales Director
Bryan Lee
East Sales Director
John Lim
Account Executive
Mike Green
Account Executive

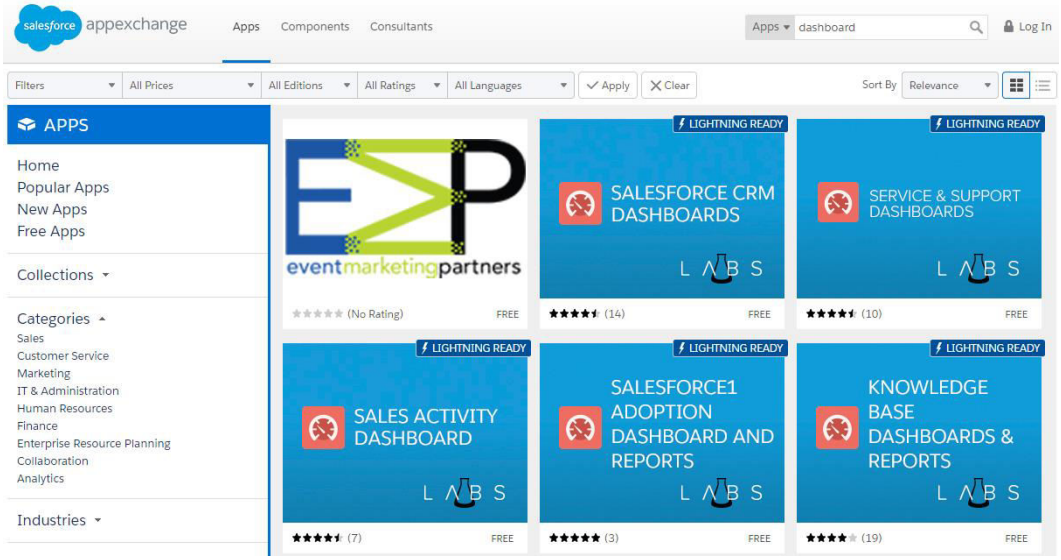

Properties
*Name
test 1
Description
*Folder
APAC Dashboard
View Dashboard As
Me
A specified user
The logged in user
Allow dashboard viewers to change this (dynamic dashboard)
Cancel
Save


Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
Contacts
DASHBOARD
Account Dashboard
As of May 21, 2017 5:40 PM·Viewing as Johan Yu
Account Industry
All
Account by Owner
All accounts
Record Count
0
400
Johan Yu
409
Alvin Lee
5
Account Owner
Date = all time | View Report
Account by Owner
All accounts
414
409
Account Owner
Johan Yu
Alvin Lee
Date = all time | View Report
Account by Type
Customer - Direct
Customer - Channel
Prospect
2
Type
View Report
Alvin Lee
gs0.salesforce.com
Settings
Log Out
Quick Find
USERNAMES
18 More Usernames
OPTIONS
Add Username


DASHBOARD
Account Dashboard
As of May 21, 2017 8:29 PM·Viewing as Johan Yu·Change
Account Industry
All
Account by Type
Record Count
0
100
200
300
397
Customer - Direct
9
Customer - Channel
6
Prospect
2
Type
View Report
Account by Owner
All accounts
414
408
Account Owner
Johan Yu
Alvin Lee
Date = all time | View Report


DASHBOARD
Account Dashboard
As of May 21, 2017 8:29 PM·Viewing as Alvin Lee Change
Account Industry
All
Account by Type
Record Count
0
2
4
Customer - Direct
Customer - Channel
-
Prospect
4
2
1
1
Type
View Report
Account by Owner
All accounts
2
8
6
Account Owner
Alvin Lee
Johan Yu
Date = all time | View Report


DASHBOARD
Account Dashboard
As of May 21, 2017 9:32 PM Viewing as Johan Yu Change
Refresh
Edit
Account Industry
equals Apparel or Education
Account by Type
Record Count
0
1
2
Type
Customer - Dir...
2
View Report
Account by Owner
All accounts
Account Owner
Alvin Lee
Johan Yu
2
Date = all time | View Report
Account by Owner
All accounts
Record Count
0
1
Account Owner
Alvin Lee
1
Johan Yu
1
Date = all time | View Report
REPORT
Account by Type
Edit
Total Records
2
Type
Customer - Direct
2
2
Filters
Show Me
All accounts
Created Date
All time
Linked Filters
Industry equals Apparel, Education
TYPE
ACCOUNT OWNER
ACCOUNT NAME
LAST MODIFIED DATE
CREATED DATE
Customer - Direct (2 records)
Johan Yu
Burlington Textiles Corp of America
5/4/2017
5/24/2014
Alvin Lee
University of Arizona
5/21/2017
5/24/2014
GRAND TOTAL (2 RECORDS)



Salesforce CRM Dashboards

Great dashboard pack to get you started.

★★★★½ (14)

Free - *Details below*

OVERVIEW DETAILS REVIEWS 14 PROVIDER Save Get It Now

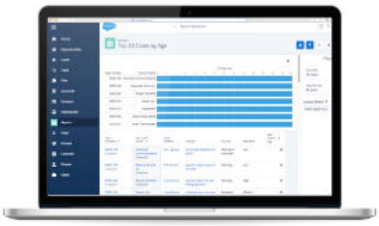
App by Salesforce Labs

Your one stop shop for GREAT example dashboards. Includes dashboards for Executives, Reps, Sales, Support and more. Checkout the documentation for details.

RELEASED
6/27/2011

PRICING
Free

CATEGORIES
Analytics



Salesforce CRM Dashboards in Lightning

Salesforce CRM Dashboards

Great dashboard pack to get you started.

★★★★½ (14)

Free - *Details below*

OVERVIEW DETAILS REVIEWS 14 PROVIDER Save Get It Now

How would you like to continue?

Install in production
Includes active, trial or developer orgs

Install in Sandbox
Test in a copy of your production org

Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

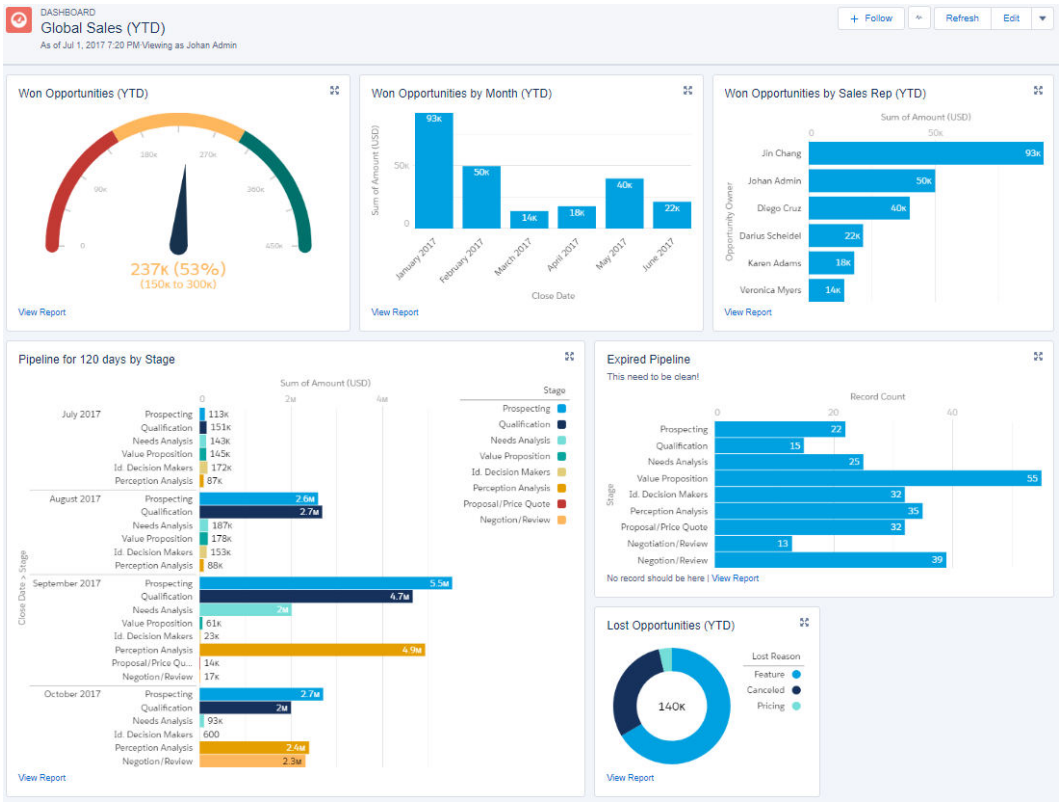
Depending on the links next to an installed package, you can take different actions from this page.

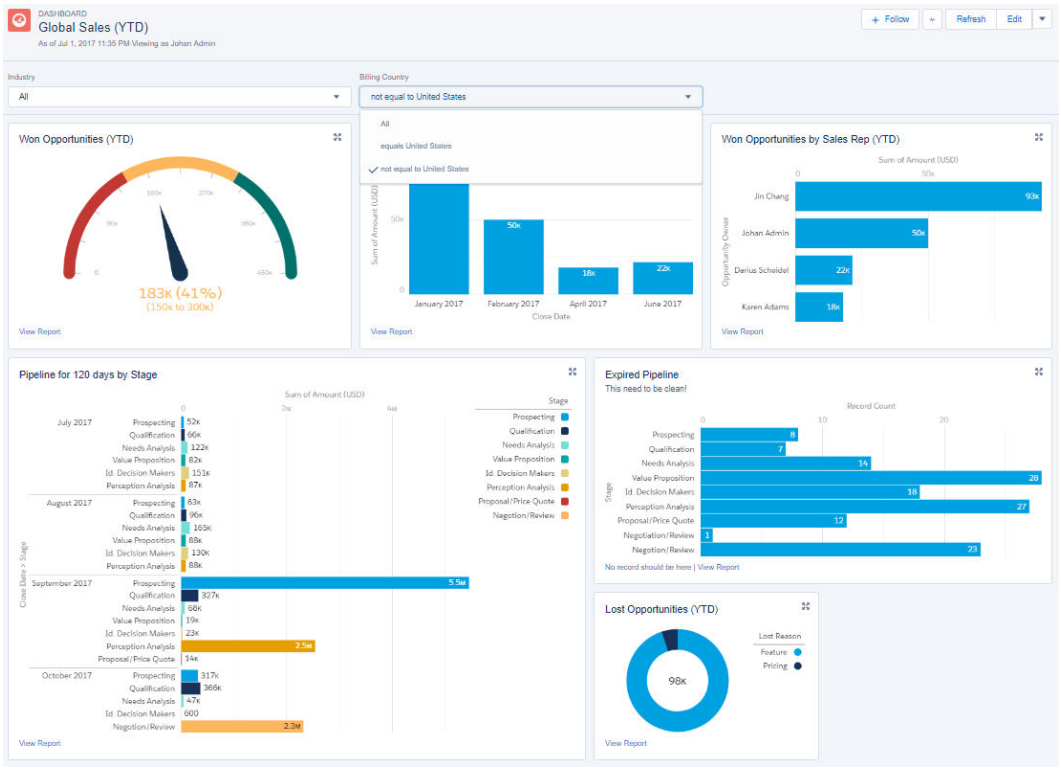
To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

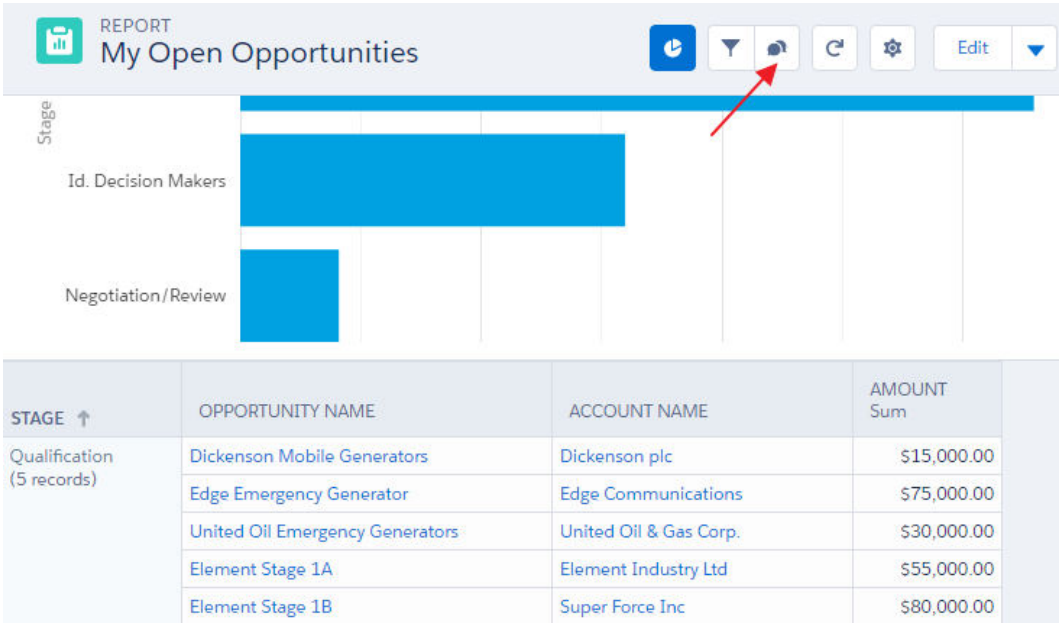
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits
Uninstall	RestExplorer	SFDC	1.7		9/26/2014 5:12 PM	✓
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	10/16/2014 11:41 AM	✓
	Description: This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...					
Uninstall	Salesforce1 and Chatter Apps	Salesforce.com	1.8	sf_chttr_apps	12/24/2014 12:27 PM	
	Description: This package contains Connected Applications for all the officially supported Salesforce1 and Chatter applications on your desktop and mobile devices!					
Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		5/21/2017 10:03 PM	✓
	Description: Salesforce.com CRM Dashboards					
Uninstall	Calculator Component	salesforce	1.45	ACalculator	6/5/2016 8:05 AM	

SETUP
Package Manager
Sales Executive Dashboard
Dashboard
Service Executive Overview
Dashboard
Agent Supervisor Overview
Dashboard
Salesperson Dashboard
Dashboard
Sales and Marketing Dashboard - Reports
Report Folder
Best Practice Service Dashboards
Dashboard Folder
Example Sales and Marketing Dashboards
Dashboard Folder
High Priority Open Cases by Account
Report
Sales Tools
Document Folder

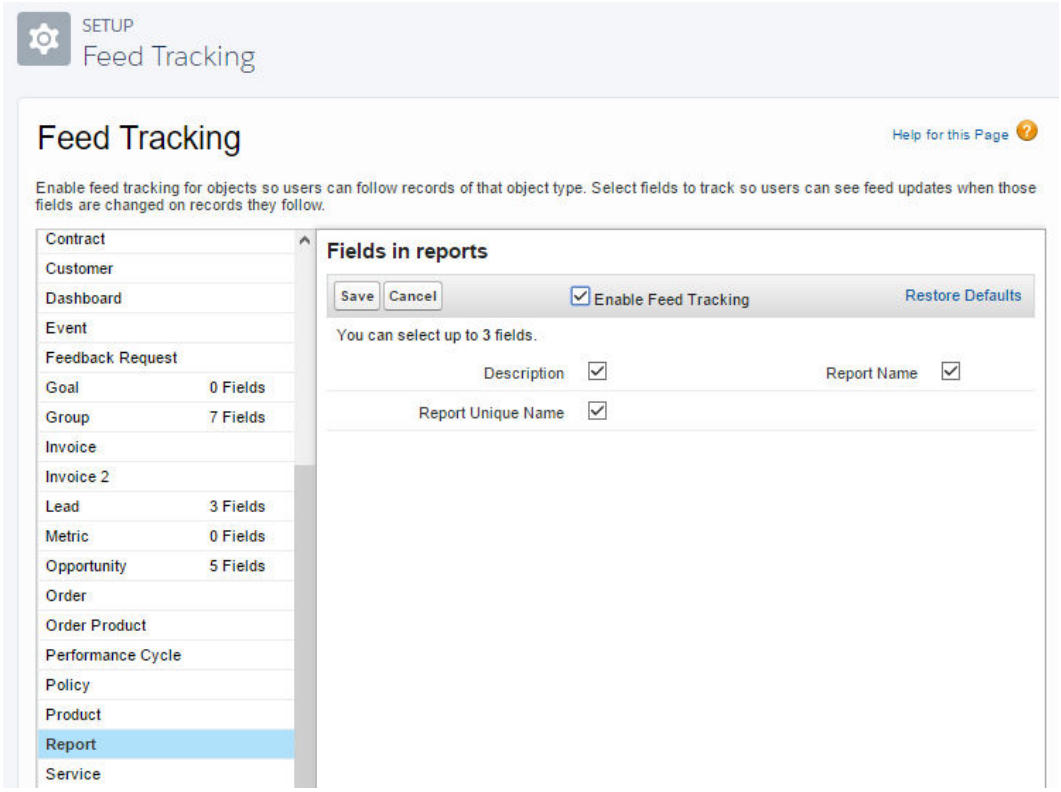

DASHBOARD
Global Sales (YTD)
As of Jul 1, 2017 7:20 PM·Viewing as Johan Admin
+ Follow
Refresh
Edit
Won Opportunities (YTD)
237K (53%)
(150K to 300K)
View Report
Won Opportunities by Month (YTD)
Sum of Amount (USD)
Close Date
January 2017
February 2017
March 2017
April 2017
May 2017
June 2017
View Report
Won Opportunities by Sales Rep (YTD)
Sum of Amount (USD)
Opportunity Owner
Jin Chang
Johan Admin
Diego Cruz
Darius Scheidel
Karen Adams
Veronica Myers
View Report
Pipeline for 120 days by Stage
Sum of Amount (USD)
Close Date > Stage
Stage
Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Quote
Negotiation/Review
View Report
Expired Pipeline
This need to be clean!
Record Count
Stage
No record should be here | View Report
Lost Opportunities (YTD)
140K
Lost Reason
Feature
Canceled
Pricing
View Report

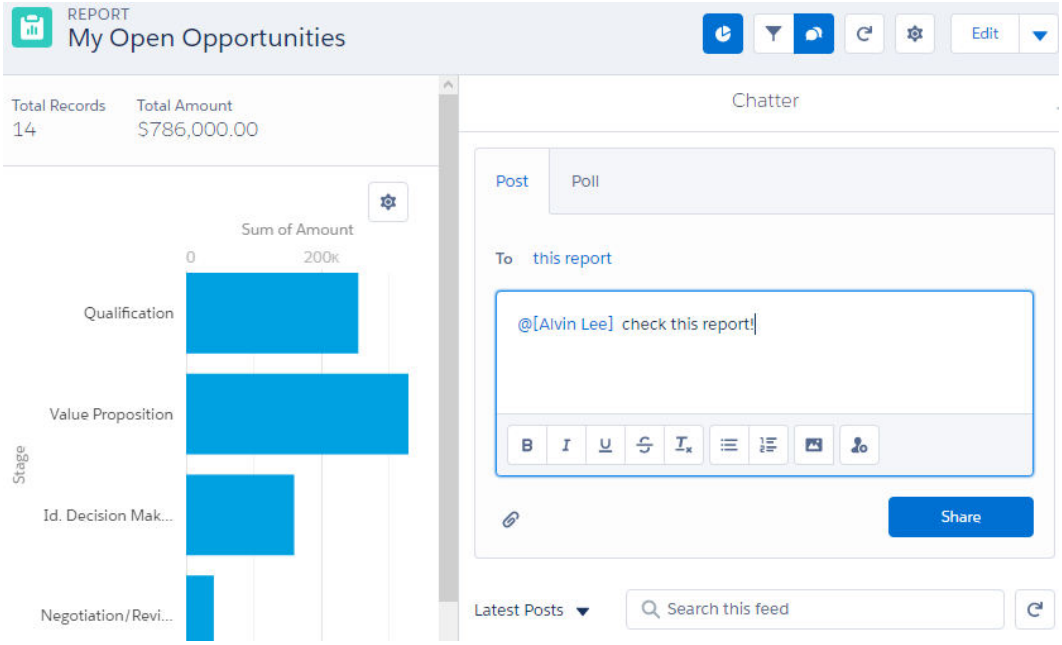

DASHBOARD
Global Sales (YTD)
As of Jul 1, 2017 11:35 PM Viewing as Johan Admin
+ Follow
Refresh
Edit
Industry
All
Billing Country
not equal to United States
All
equals United States
not equal to United States
Won Opportunities (YTD)
183K (41%)
(150k to 300k)
View Report
Sum of Amount (USD)
50k
January 2017
50k
February 2017
18k
April 2017
22k
June 2017
Close Date
View Report
Won Opportunities by Sales Rep (YTD)
Sum of Amount (USD)
Jin Chang
93k
Johan Admin
50k
Derius Scheidel
22k
Karen Adams
18k
Opportunity Owner
View Report
Pipeline for 120 days by Stage
Sum of Amount (USD)
Close Date > Stage
July 2017
Prospecting 52k
Qualification 96k
Needs Analysis 122k
Value Proposition 82k
Id. Decision Makers 151k
Perception Analysis 87k
August 2017
Prospecting 63k
Qualification 96k
Needs Analysis 165K
Value Proposition 88k
Id. Decision Makers 130K
Perception Analysis 88k
September 2017
Prospecting 5.5M
Qualification 327k
Needs Analysis 98k
Value Proposition 19k
Id. Decision Makers 23k
Perception Analysis 2.5M
Proposal/Price Quote 14k
October 2017
Prospecting 317k
Qualification 366k
Needs Analysis 47k
Id. Decision Makers 600
Negotion/Review 2.3M
Stage
Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Quote
Negotion/Review
View Report
Expired Pipeline
This need to be clean!
Record Count
Prospecting 8
Qualification 7
Needs Analysis 14
Value Proposition 28
Id. Decision Makers 18
Perception Analysis 27
Proposal/Price Quote 12
Negotiation/Review 1
Negotion/Review 23
Stage
No record should be here | View Report
Lost Opportunities (YTD)
98K
Lost Reason
Feature
Pricing
View Report

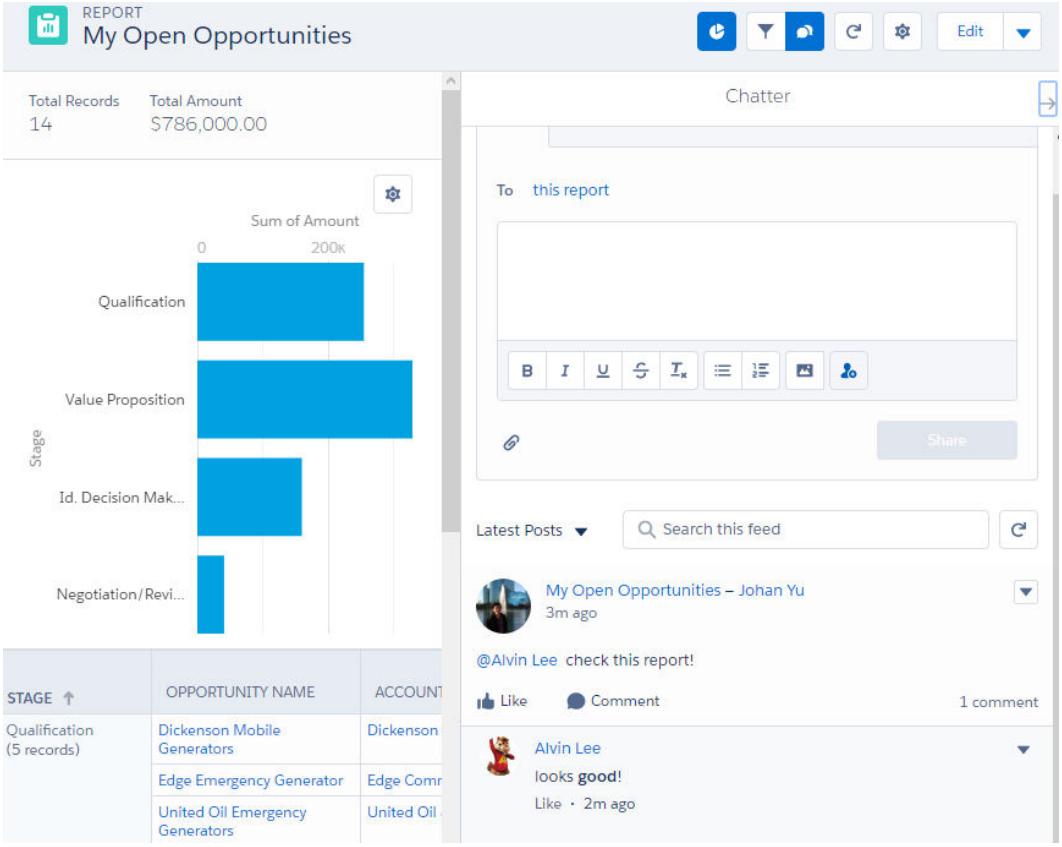
Chapter 11: Advanced Tips and Tricks for Reports and Dashboards

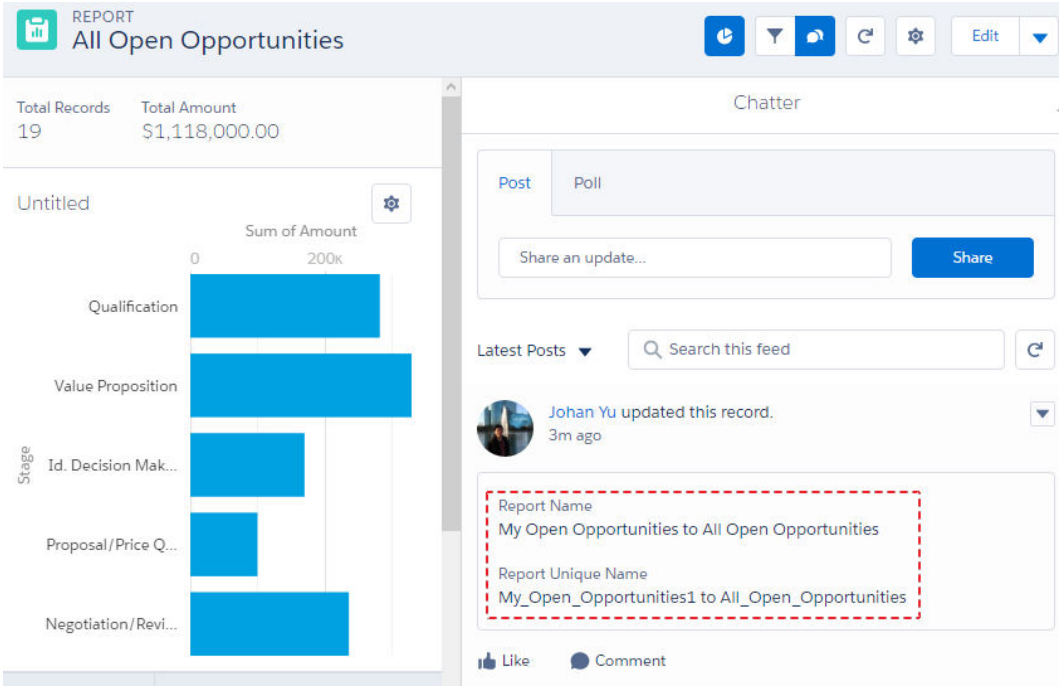


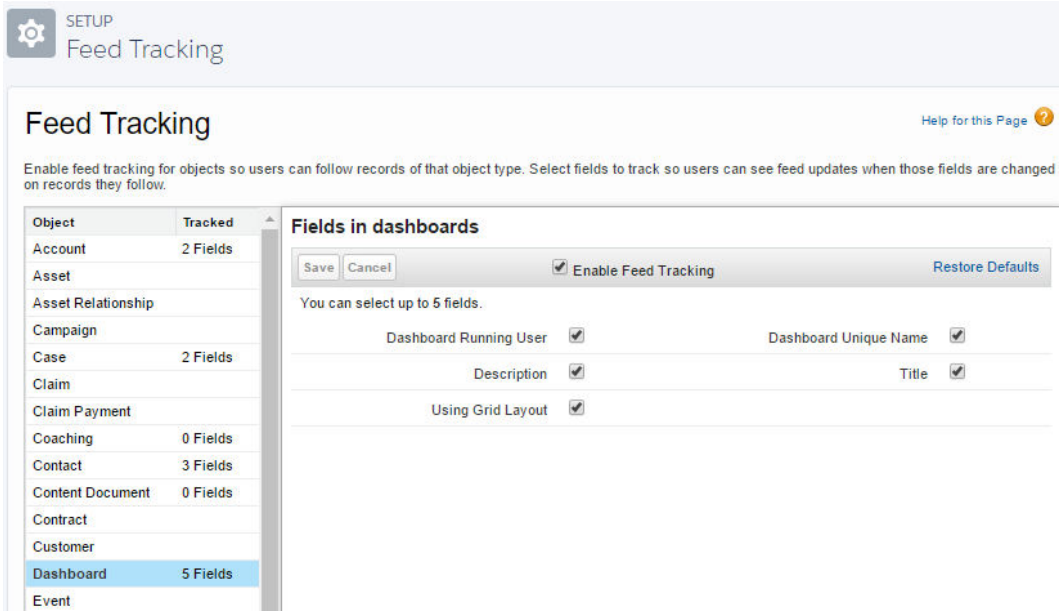
STAGE	OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT Sum
Qualification (5 records)	Dickenson Mobile Generators	Dickenson plc	$15,000.00
	Edge Emergency Generator	Edge Communications	$75,000.00
	United Oil Emergency Generators	United Oil & Gas Corp.	$30,000.00
	Element Stage 1A	Element Industry Ltd	$55,000.00
	Element Stage 1B	Super Force Inc	$80,000.00

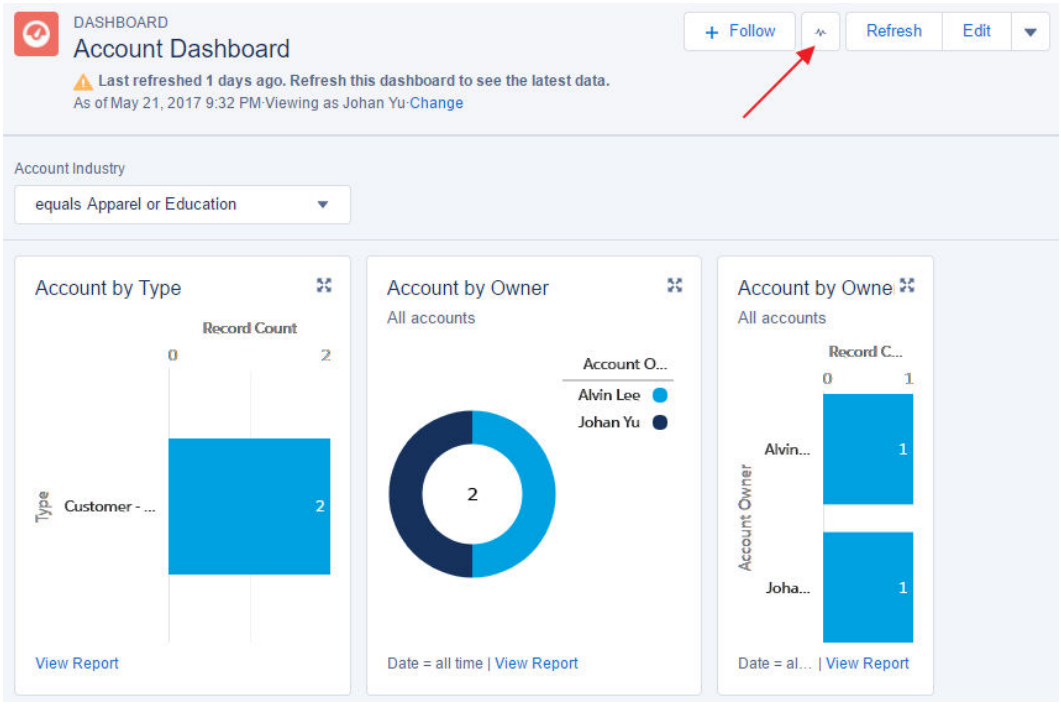

SETUP
Feed Tracking
Feed Tracking
Help for this Page
Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.
Contract
Customer
Dashboard
Event
Feedback Request
Goal 0 Fields
Group 7 Fields
Invoice
Invoice 2
Lead 3 Fields
Metric 0 Fields
Opportunity 5 Fields
Order
Order Product
Performance Cycle
Policy
Product
Report
Service
Fields in reports
Save
Cancel
Enable Feed Tracking
Restore Defaults
You can select up to 3 fields.
Description
Report Name
Report Unique Name

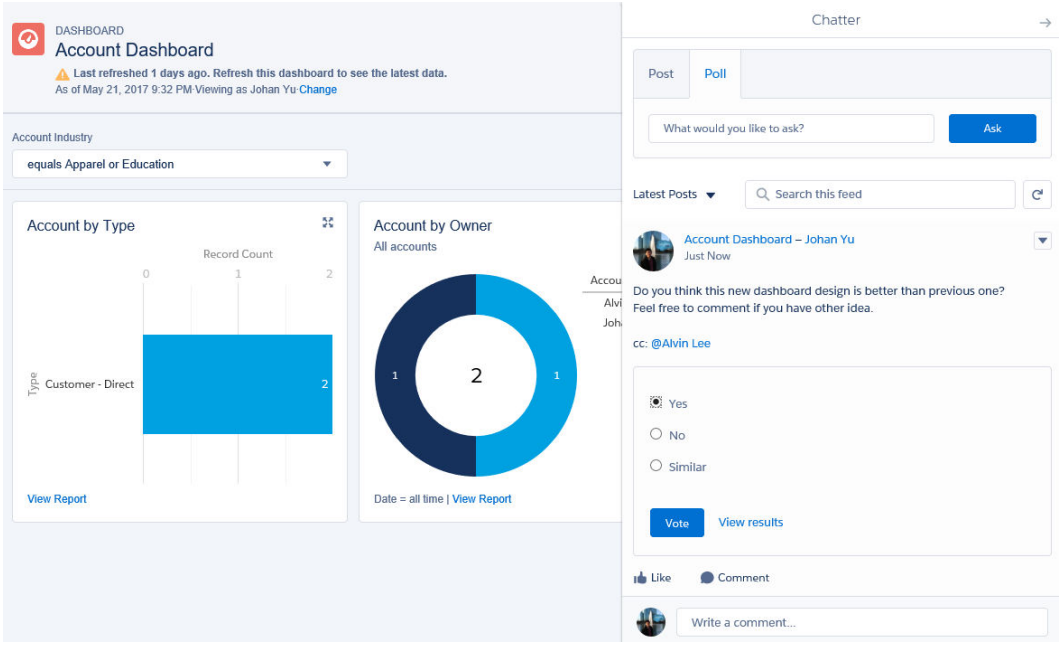

REPORT
My Open Opportunities
Edit
Total Records
14
Total Amount
$786,000.00
Sum of Amount
0
200K
Qualification
Value Proposition
Id. Decision Mak...
Negotiation/Revi...
Stage
Chatter
Post
Poll
To this report
@[Alvin Lee] check this report!
Share
Latest Posts
Search this feed

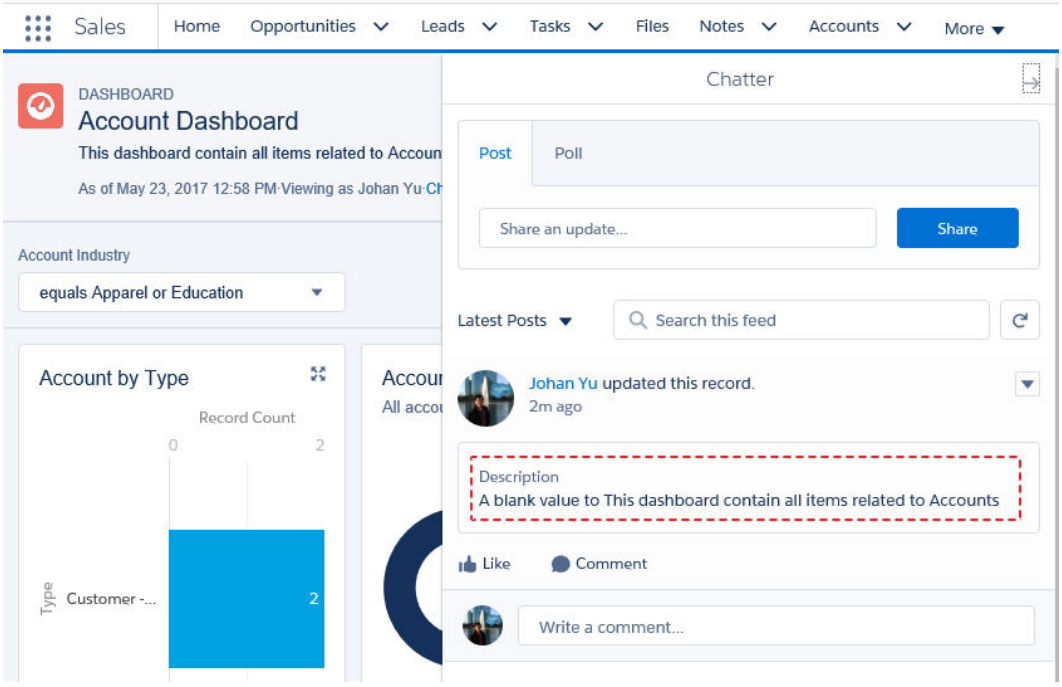

REPORT
My Open Opportunities
Edit
Total Records
14
Total Amount
$786,000.00
Sum of Amount
0
200k
Qualification
Value Proposition
Stage
Id. Decision Mak...
Negotiation/Revi...
STAGE
OPPORTUNITY NAME
ACCOUNT
Qualification (5 records)
Dickenson Mobile Generators
Dickenson
Edge Emergency Generator
Edge Comr
United Oil Emergency Generators
United Oil
Chatter
To this report
Share
Latest Posts
Search this feed
My Open Opportunities – Johan Yu
3m ago
@Alvin Lee check this report!
Like
Comment
1 comment
Alvin Lee
looks good!
Like · 2m ago

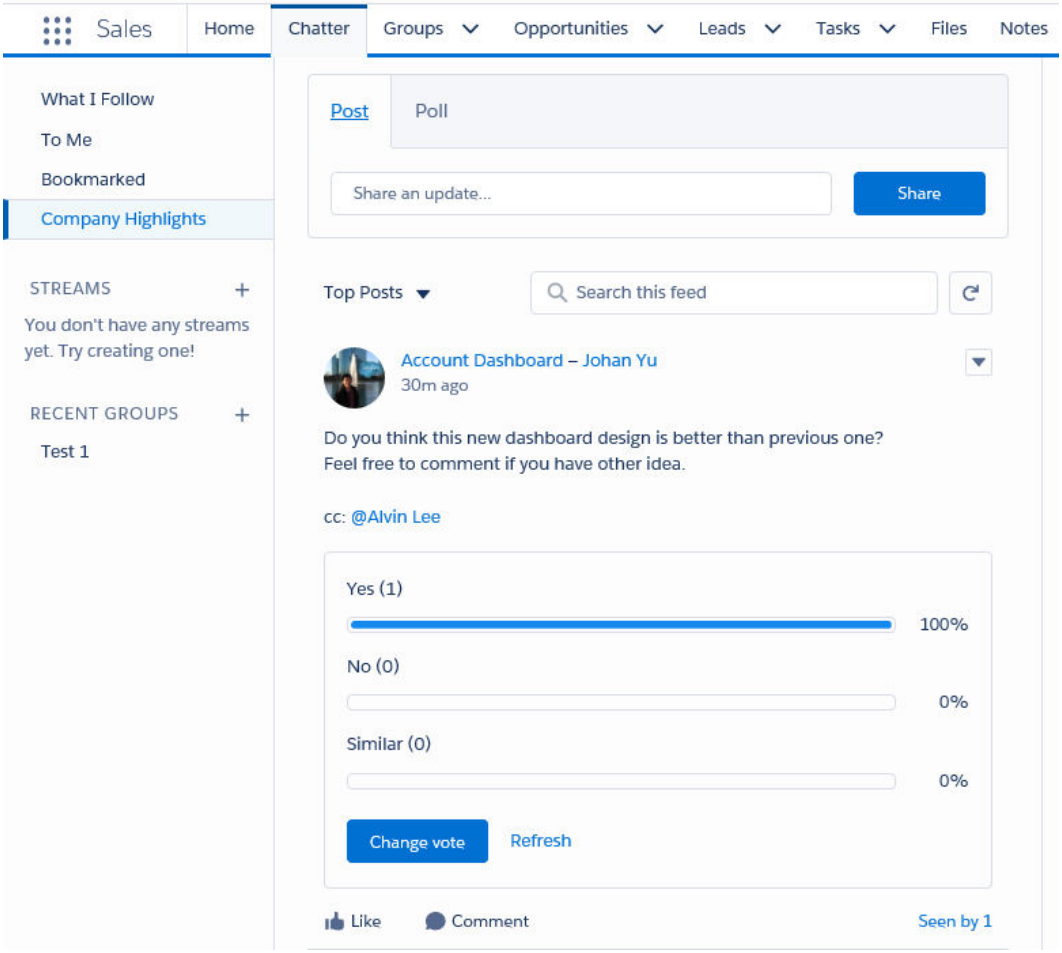

REPORT
All Open Opportunities
Edit
Total Records
19
Total Amount
$1,118,000.00
Untitled
Sum of Amount
0
200k
Qualification
Value Proposition
Id. Decision Mak...
Proposal/Price Q...
Negotiation/Revi...
Stage
Chatter
Post
Poll
Share an update...
Share
Latest Posts
Search this feed
Johan Yu updated this record.
3m ago
Report Name
My Open Opportunities to All Open Opportunities
Report Unique Name
My_Open_Opportunities1 to All_Open_Opportunities
Like
Comment

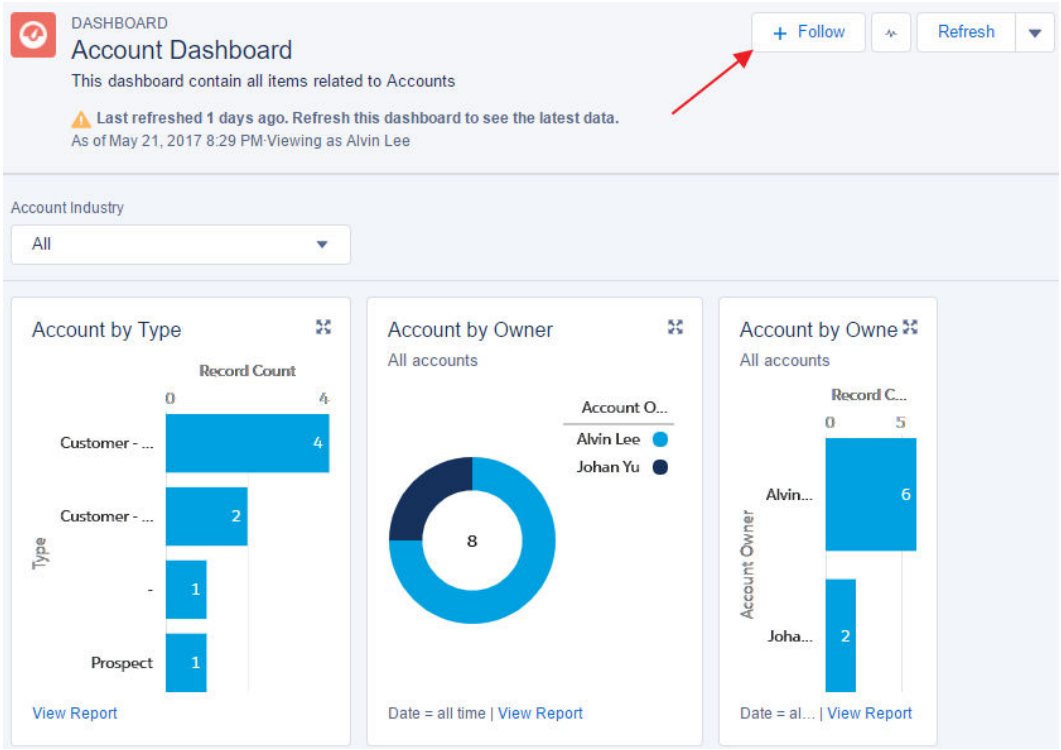

SETUP
Feed Tracking
Feed Tracking
Help for this Page
Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.
Object
Tracked
Account
2 Fields
Asset
Asset Relationship
Campaign
Case
2 Fields
Claim
Claim Payment
Coaching
0 Fields
Contact
3 Fields
Content Document
0 Fields
Contract
Customer
Dashboard
5 Fields
Event
Fields in dashboards
Save
Cancel
Enable Feed Tracking
Restore Defaults
You can select up to 5 fields.
Dashboard Running User
Dashboard Unique Name
Description
Title
Using Grid Layout

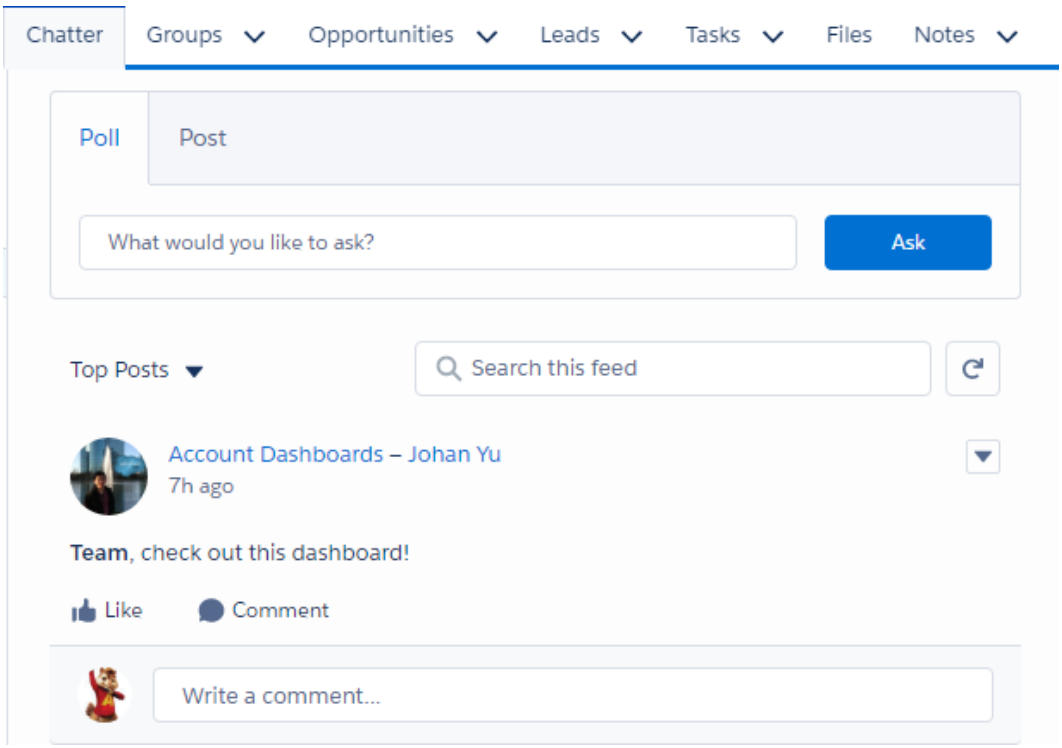

DASHBOARD
Account Dashboard
+ Follow
Refresh
Edit
Last refreshed 1 days ago. Refresh this dashboard to see the latest data.
As of May 21, 2017 9:32 PM·Viewing as Johan Yu·Change
Account Industry
equals Apparel or Education
Account by Type
Record Count
0
2
Type
Customer - ...
2
View Report
Account by Owner
All accounts
Account O...
Alvin Lee
Johan Yu
2
Date = all time | View Report
Account by Owne
All accounts
Record C...
0
1
Alvin...
1
Joha...
1
Account Owner
Date = al... | View Report

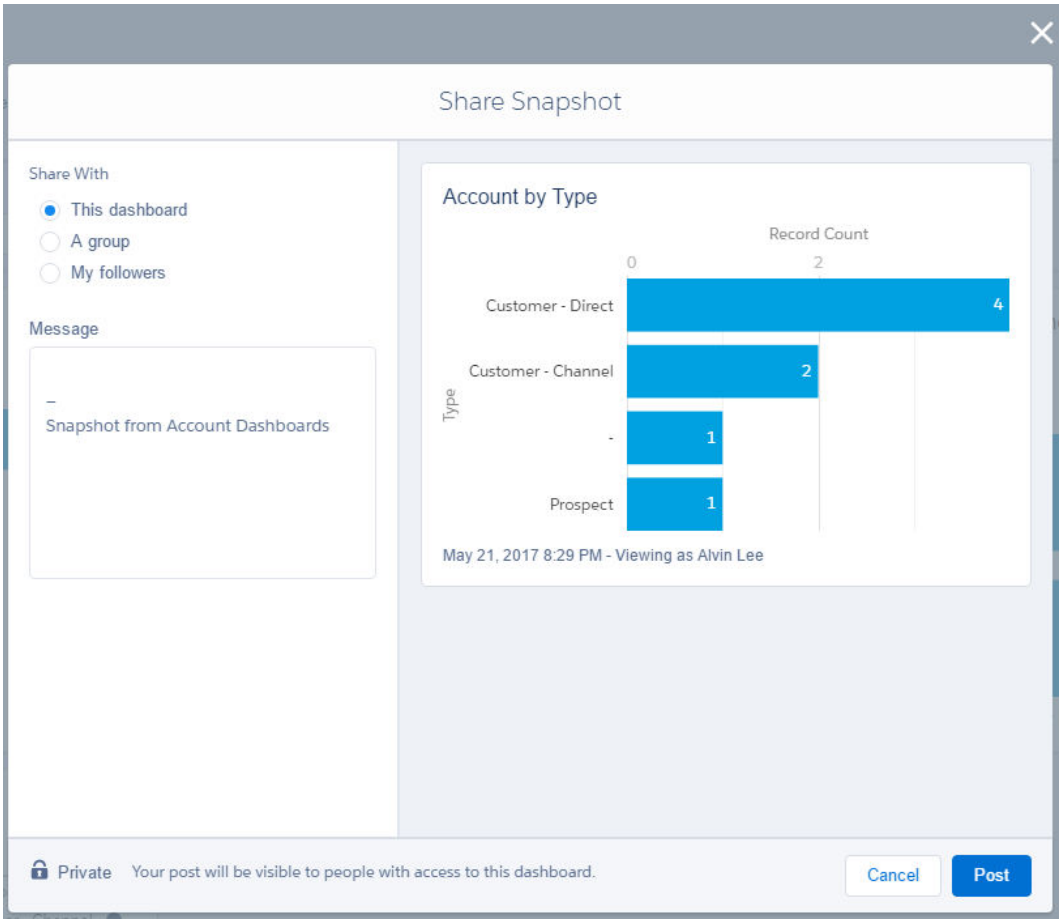

DASHBOARD
Account Dashboard
Last refreshed 1 days ago. Refresh this dashboard to see the latest data.
As of May 21, 2017 9:32 PM·Viewing as Johan Yu·Change
Account Industry
equals Apparel or Education
Account by Type
Record Count
0
1
2
Type
Customer - Direct
2
View Report
Account by Owner
All accounts
1
2
1
Date = all time | View Report
Chatter
Post
Poll
What would you like to ask?
Ask
Latest Posts
Search this feed
Account Dashboard – Johan Yu
Just Now
Do you think this new dashboard design is better than previous one?
Feel free to comment if you have other idea.
cc: @Alvin Lee
Yes
No
Similar
Vote
View results
Like
Comment
Write a comment...


Sales
Home
Opportunities
Leads
Tasks
Files
Notes
Accounts
More
DASHBOARD
Account Dashboard
This dashboard contain all items related to Accoun
As of May 23, 2017 12:58 PM·Viewing as Johan Yu·Ch
Account Industry
equals Apparel or Education
Account by Type
Record Count
0
2
Type
Customer -...
2
Chatter
Post
Poll
Share an update...
Share
Latest Posts
Search this feed
Johan Yu updated this record.
2m ago
Description
A blank value to This dashboard contain all items related to Accounts
Like
Comment
Write a comment...


Sales
Home
Chatter
Groups
Opportunities
Leads
Tasks
Files
Notes
What I Follow
To Me
Bookmarked
Company Highlights
STREAMS
You don't have any streams yet. Try creating one!
RECENT GROUPS
Test 1
Post
Poll
Share an update...
Share
Top Posts
Search this feed
Account Dashboard – Johan Yu
30m ago
Do you think this new dashboard design is better than previous one?
Feel free to comment if you have other idea.
cc: @Alvin Lee
Yes (1)
100%
No (0)
0%
Similar (0)
0%
Change vote
Refresh
Like
Comment
Seen by 1


DASHBOARD
Account Dashboard
This dashboard contain all items related to Accounts
Last refreshed 1 days ago. Refresh this dashboard to see the latest data.
As of May 21, 2017 8:29 PM·Viewing as Alvin Lee
+ Follow
Refresh
Account Industry
All
Account by Type
Record Count
0
4
Customer - ...
4
Customer - ...
2
-
1
Prospect
1
Type
View Report
Account by Owner
All accounts
Account O...
Alvin Lee
Johan Yu
8
Date = all time | View Report
Account by Owne
All accounts
Record C...
0
5
Alvin...
6
Joha...
2
Account Owner
Date = al... | View Report


Chatter
Groups
Opportunities
Leads
Tasks
Files
Notes
Poll
Post
What would you like to ask?
Ask
Top Posts
Search this feed
Account Dashboards – Johan Yu
7h ago
Team, check out this dashboard!
Like
Comment
Write a comment...


Share Snapshot
Share With
This dashboard
A group
My followers
Message
–
Snapshot from Account Dashboards
Account by Type
Record Count
0
2
Customer - Direct
4
Customer - Channel
2
-
1
Prospect
1
Type
May 21, 2017 8:29 PM - Viewing as Alvin Lee
Private
Your post will be visible to people with access to this dashboard.
Cancel
Post

CHATTER ENGAGEMENT

Post Poll

Share an update...

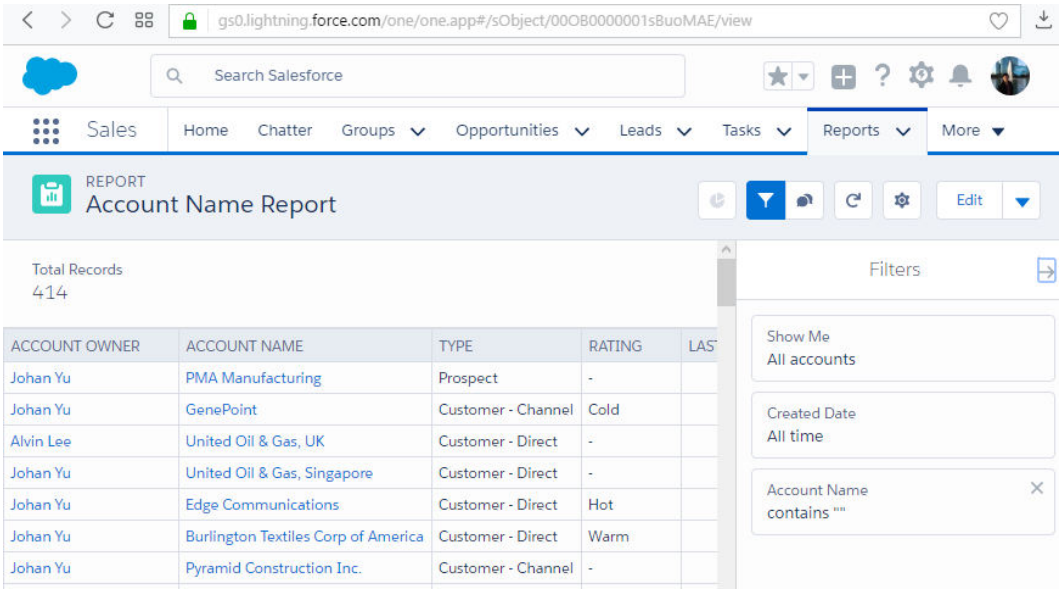
Most Recent Activity

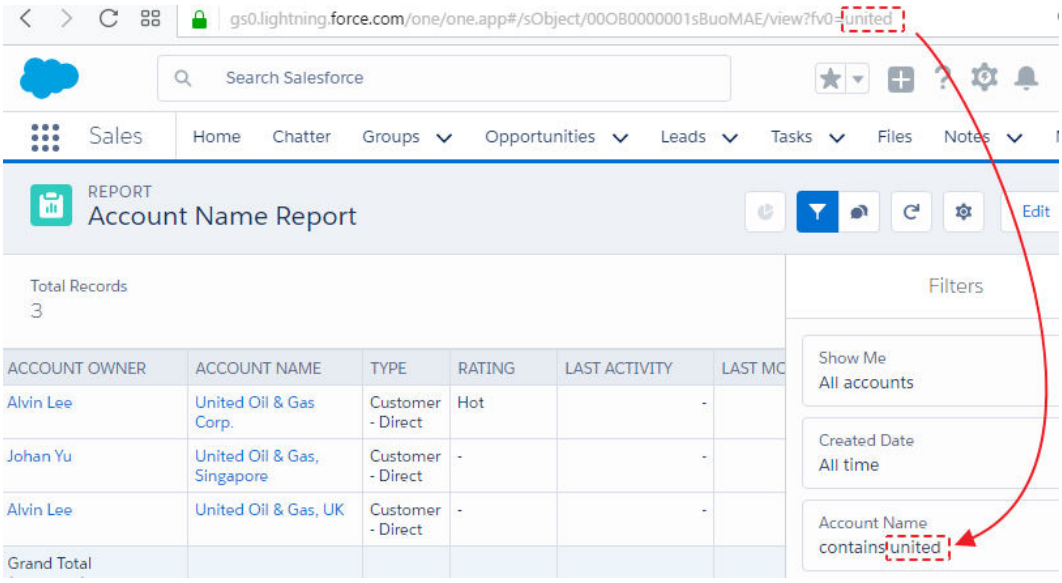
Johan Yu
15m ago

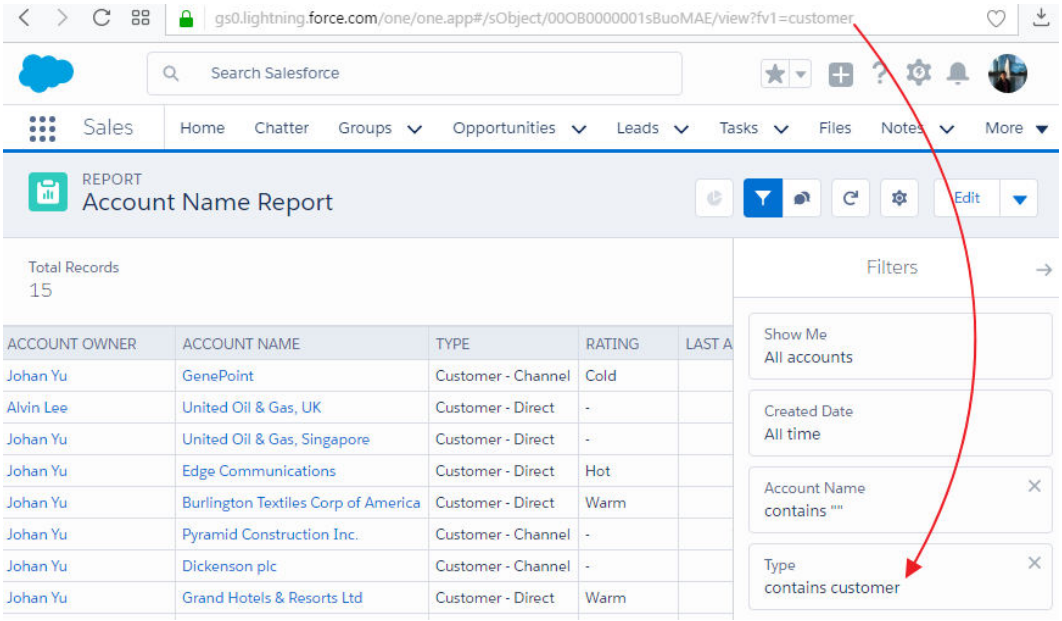
Guys, check this chart!
–
Snapshot from Account Dashboards
https://gs0.lightning.force.com/one/one.app#/sObject/01ZB0000000P3fPMAS/view

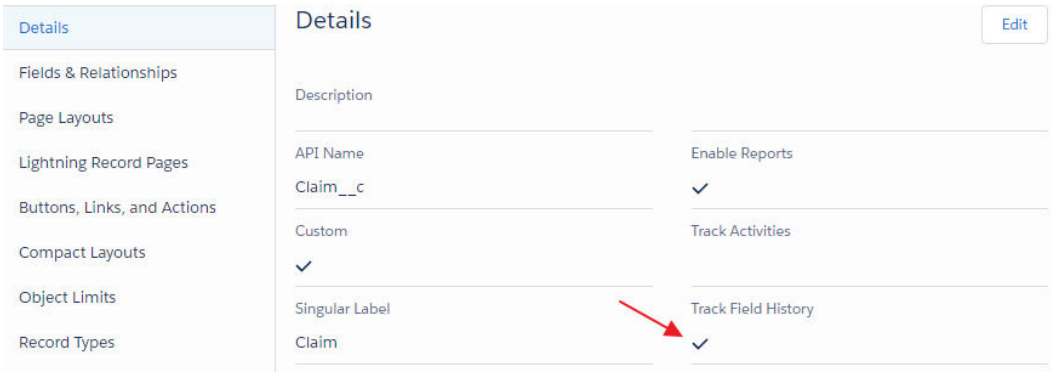
Like Comment Share

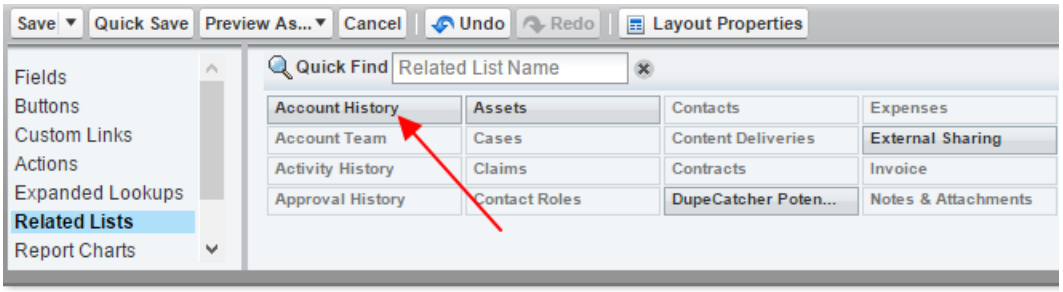
Write a comment...


gs0.lightning.force.com/one/one.app#/sObject/00OB0000001sBuoMAE/view
Search Salesforce
Sales
Home
Chatter
Groups
Opportunities
Leads
Tasks
Reports
More
REPORT
Account Name Report
Edit
Total Records
414
Filters
Show Me
All accounts
Created Date
All time
Account Name
contains ""
ACCOUNT OWNER
ACCOUNT NAME
TYPE
RATING
LAST
Johan Yu
PMA Manufacturing
Prospect
-
Johan Yu
GenePoint
Customer - Channel
Cold
Alvin Lee
United Oil & Gas, UK
Customer - Direct
-
Johan Yu
United Oil & Gas, Singapore
Customer - Direct
-
Johan Yu
Edge Communications
Customer - Direct
Hot
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
Warm
Johan Yu
Pyramid Construction Inc.
Customer - Channel
-


gs0.lightning.force.com/one/one.app#/sObject/00OB0000001sBuoMAE/view?fv0=united
Search Salesforce
Sales
Home
Chatter
Groups
Opportunities
Leads
Tasks
Files
Notes
REPORT
Account Name Report
Edit
Total Records
3
Filters
Show Me
All accounts
Created Date
All time
Account Name
contains united
ACCOUNT OWNER
ACCOUNT NAME
TYPE
RATING
LAST ACTIVITY
LAST MC
Alvin Lee
United Oil & Gas Corp.
Customer - Direct
Hot
-
Johan Yu
United Oil & Gas, Singapore
Customer - Direct
-
-
Alvin Lee
United Oil & Gas, UK
Customer - Direct
-
-
Grand Total


gs0.lightning.force.com/one/one.app#/sObject/00OB0000001sBuoMAE/view?fv1=customer
Search Salesforce
Sales
Home
Chatter
Groups
Opportunities
Leads
Tasks
Files
Notes
More
REPORT
Account Name Report
Edit
Total Records
15
Filters
ACCOUNT OWNER
ACCOUNT NAME
TYPE
RATING
LAST A
Johan Yu
GenePoint
Customer - Channel
Cold
Alvin Lee
United Oil & Gas, UK
Customer - Direct
-
Johan Yu
United Oil & Gas, Singapore
Customer - Direct
-
Johan Yu
Edge Communications
Customer - Direct
Hot
Johan Yu
Burlington Textiles Corp of America
Customer - Direct
Warm
Johan Yu
Pyramid Construction Inc.
Customer - Channel
-
Johan Yu
Dickenson plc
Customer - Channel
-
Johan Yu
Grand Hotels & Resorts Ltd
Customer - Direct
Warm
Show Me
All accounts
Created Date
All time
Account Name
contains ""
Type
contains customer


Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Details
Edit
Description
API Name
Claim__c
Custom
Singular Label
Claim
Enable Reports
Track Activities
Track Field History



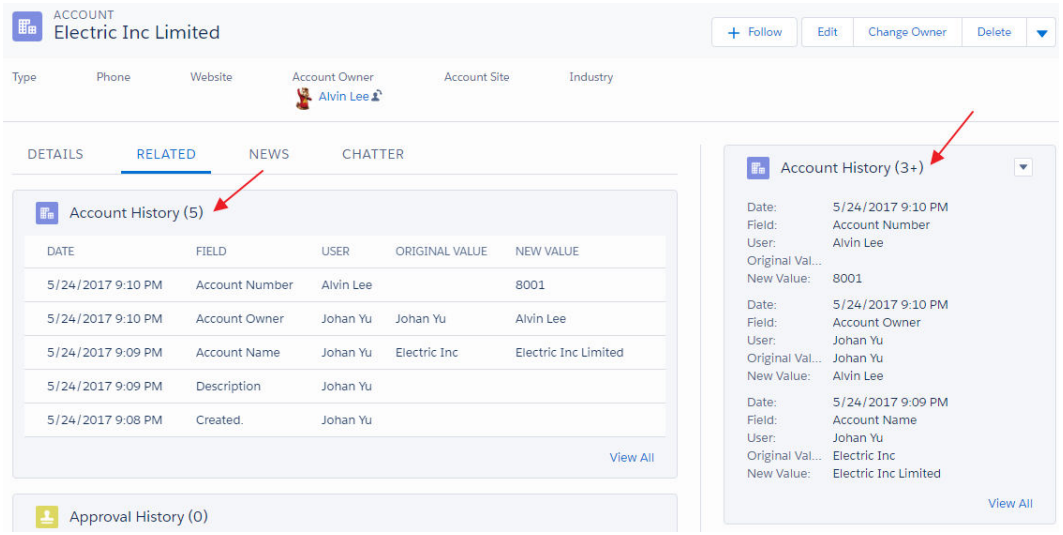
Mobile Cards (Salesforce1 only)

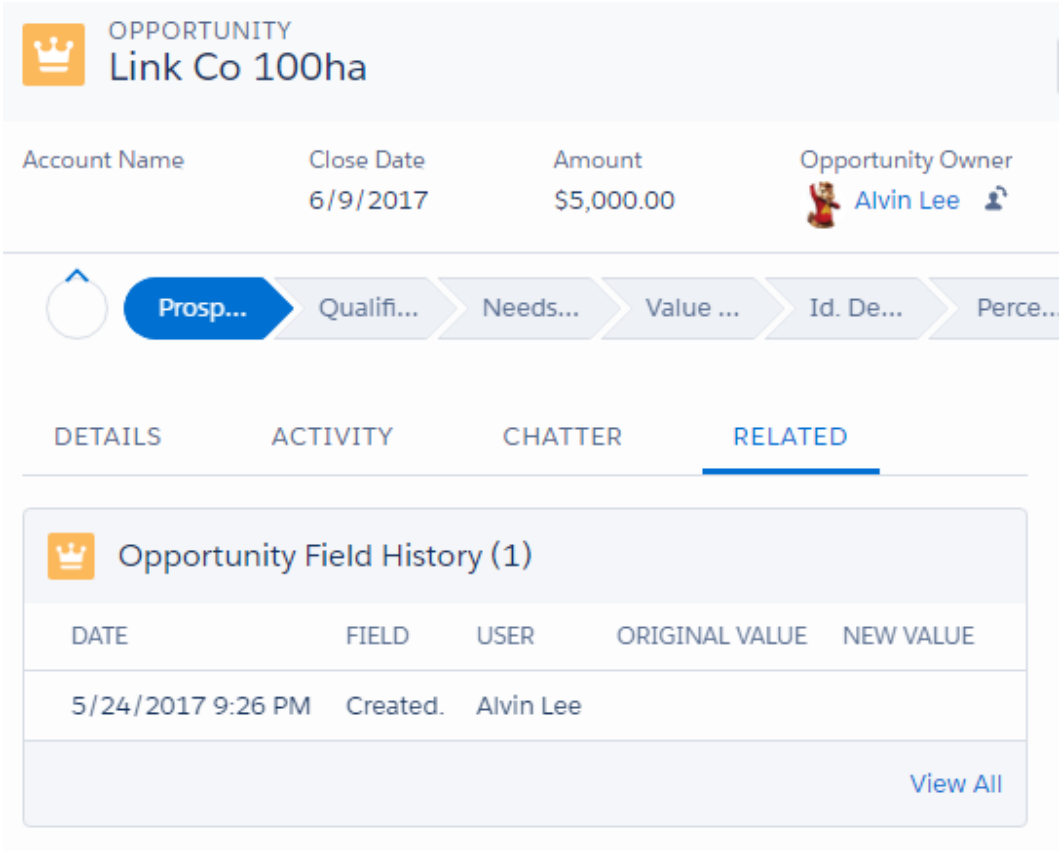
Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

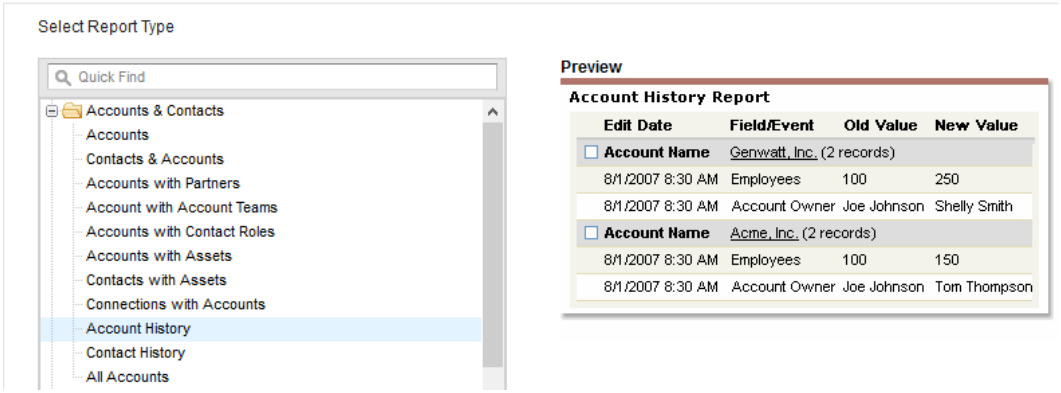
Related Lists

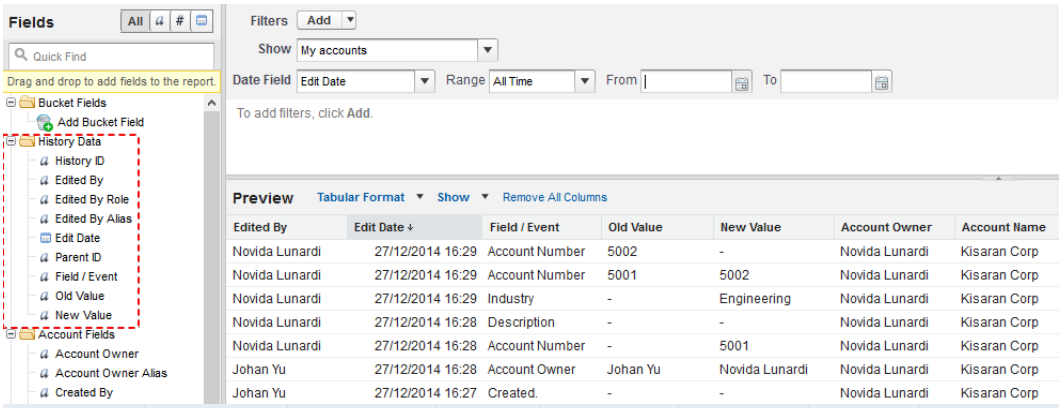
Opportunities New

Opportunity Name	Stage
Sample Opportunity Name	Sample Stage

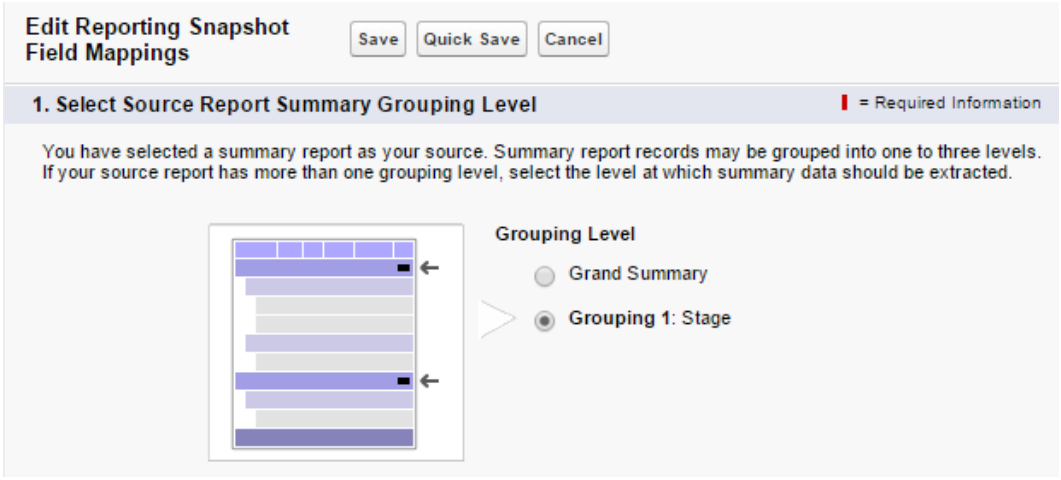



OPPORTUNITY
Link Co 100ha
Account Name
Close Date
6/9/2017
Amount
$5,000.00
Opportunity Owner
Alvin Lee
Prosp...
Qualifi...
Needs...
Value ...
Id. De...
Perce...
DETAILS
ACTIVITY
CHATTER
RELATED
Opportunity Field History (1)
DATE
FIELD
USER
ORIGINAL VALUE
NEW VALUE
5/24/2017 9:26 PM
Created.
Alvin Lee
View All


Select Report Type
Quick Find
Accounts & Contacts
Accounts
Contacts & Accounts
Accounts with Partners
Account with Account Teams
Accounts with Contact Roles
Accounts with Assets
Contacts with Assets
Connections with Accounts
Account History
Contact History
All Accounts
Preview
Account History Report
Edit Date
Field/Event
Old Value
New Value
Account Name
Genwatt, Inc. (2 records)
8/1/2007 8:30 AM
Employees
100
250
8/1/2007 8:30 AM
Account Owner
Joe Johnson
Shelly Smith
Account Name
Acme, Inc. (2 records)
8/1/2007 8:30 AM
Employees
100
150
8/1/2007 8:30 AM
Account Owner
Joe Johnson
Tom Thompson



HISTORY ID	PARENT ID	ACCOUNT NAME	EDITED BY	EDIT DATE ↓	FIELD / EVENT	OLD VALUE	NEW VALUE
017B000002TtGNh	001B0000005W0QO	Electric Inc Limited	Alvin Lee	5/24/2017 9:10 PM	Account Number	-	8001
017B000002TtGfz	001B0000005W0QO	Electric Inc Limited	Johan Yu	5/24/2017 9:10 PM	Account Owner	Johan Yu	Alvin Lee
017B000002TtGcL	001B0000005W0QO	Electric Inc Limited	Johan Yu	5/24/2017 9:09 PM	Description	-	-
017B000002TtGcK	001B0000005W0QO	Electric Inc Limited	Johan Yu	5/24/2017 9:09 PM	Account Name	Electric Inc	Electric Inc Limited
017B000002TtGYa	001B0000005W0QO	Electric Inc Limited	Johan Yu	5/24/2017 9:08 PM	Created.	-	-
017B000002TtGVC	001B0000005W0QJ	Big Inc. Limited	Johan Yu	5/24/2017 9:07 PM	Description	-	-
017B000002TtGVB	001B0000005W0QJ	Big Inc. Limited	Johan Yu	5/24/2017 9:07 PM	Account Name	Big Inc.	Big Inc. Limited
017B000002TtGWA	001B0000005W0QJ	Big Inc. Limited	Johan Yu	5/24/2017 9:07 PM	Created.	-	-



REPORT

Opportunity by Stage (for Snapshot)

Total Records	Total Amount
40	$4,511,000.00

STAGE	RECORD COUNT	AMOUNT Sum
Prospecting	1	$5,000.00
Qualification	6	$282,000.00
Value Proposition	2	$330,000.00
Id. Decision Makers	6	$170,000.00
Proposal/Price Quote	1	$100,000.00
Negotiation/Review	4	$236,000.00
Closed Won	20	$3,388,000.00
GRAND TOTAL	40	$4,511,000.00

Fields & Relationships (11)

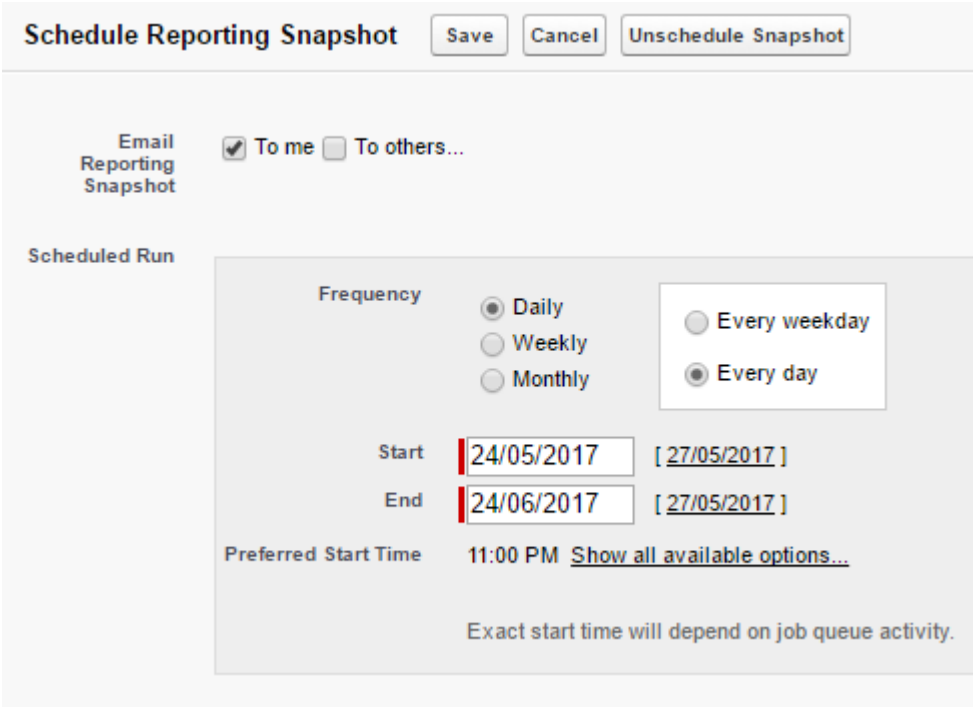
FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Execution Time	Execution_Time__c	Date/Time
Last Modified By	LastModifiedById	Lookup(User)
Opportunity Snapshot Name	Name	Auto Number
Owner	OwnerId	Lookup(User,Group)
Record Count	Record_Count__c	Number(16, 2)
Running User Id	Running_User_Id__c	Text(255)
Snapshot Name	Snapshot_Name__c	Text(255)
Stage	Stage__c	Text(25)
Total Amount	Total_Amount__c	Currency(16, 2)

Identification

Edit Delete

Reporting Snapshot Name	Opportunity Snapshot	Next Run	5/26/2017 11:00 AM
Reporting Snapshot Unique Name	Opportunity_Snapshot	Last Run	5/25/2017 11:26 AM
Description	To get daily Opportunity stage information	Created By	Johan Yu, 5/24/2017 9:58 PM
Running User	Johan Yu	Last Modified By	Johan Yu, 5/26/2017 7:33 AM
Source Report	Opportunity by Stage (for Snapshot)	Target Object	Snapshot Opportunity
Group Column	Stage		

Fields from Source Report Opportunity by Stage	*Map to*	Fields in Target Object Snapshot Opportunity
Execution Time	⇨	Execution Time (Date/Time)
(No fields with compatible data type)	⇨	Object Access Level (Lookup(User Record Access))
(No fields with compatible data type)	⇨	Owner (Lookup(User,Group))
Record Count [Record Count]	⇨	Record Count (Number(18, 0))
Reporting Snapshot Running User	⇨	Running User Id (Text(255))
Reporting Snapshot Name	⇨	Snapshot Name (Text(255))
Sales Stage	⇨	Stage (Text(20))
Amount [Sum]	⇨	Total Amount (Currency(16, 2))



Identification

Edit Delete

Reporting Snapshot Name	Opportunity Snapshot	Next Run	27/05/2017 23:00
Reporting Snapshot Unique Name	Opportunity_Snapshot	Last Run	26/05/2017 23:11
Description		Created By	Jack Bob, 24/05/2017 22:24
Running User	Jack Bob	Last Modified By	Jack Bob, 24/05/2017 22:26
Source Report	All Opportunity (Snapshot)	Target Object	Opportunity Snapshot
Group Column	Stage		

Edit Delete

Field Mappings

Edit Summary Fields in Source Report: 2 Fields in Target Object: 14

Source Report Column	Target Object Field
Execution Time	Execution Time (Date/Time)
Record Count [Record Count]	Record Count (Number(16, 2))
Reporting Snapshot Running User	Running User Id (Text(255))
Reporting Snapshot Name	Snapshot Name (Text(255))
Stage	Stage (Text(25))
Amount [Sum]	Total Amount (Currency(16, 2))

Schedule Reporting Snapshot

Edit Schedule Reporting Snapshot Help

Frequency	Preferred Start Time	Start Time	End Time
Every day	11:00 PM	24/05/2017	24/06/2017

Wed 24/5/2017 11:11 PM

noreply@salesforce.com on behalf of [redacted]

Reporting Snapshot: Opportunity Snapshot - Status - Success

To [redacted]

The reporting snapshot Opportunity Snapshot ran from 24/05/2017 23:11 to 24/05/2017 23:11. Below are details about the reporting snapshot:

8 records were inserted into the target object from the source report

0 records failed to load into the target object from the source report

The following fields on the target object could not be mapped: null

The status of the reporting snapshot is: Success

You can obtain further details by viewing the reporting snapshot's run detail page, or by clicking this link: https://ap1.salesforce.com/0A890000000M2WS. If you are not currently logged into salesforce.com, you will be asked to do so to view the reporting snapshot's run detail page.

Thank you,

salesforce.com

Schedule Reporting Snapshot

Edit

Schedule Reporting Snapshot Help

Frequency	Preferred Start Time	Start Time	End Time
Every day	11:00 PM	24/05/2017	24/06/2017

Run History

Run History Help

Run Start Time	Source Report	Running User	Target Object	Total Run Time	Records Created in Target Object	Result
26/05/2017 23:11	All Opportunity (Snapshot)	Jack Bob	Opportunity Snapshot	0 minutes	8	Success
25/05/2017 23:11	All Opportunity (Snapshot)	Jack Bob	Opportunity Snapshot	0 minutes	8	Success
24/05/2017 23:11	All Opportunity (Snapshot)	Jack Bob	Opportunity Snapshot	0 minutes	8	Success

View: All Jobs ▼ Edit | Create New View

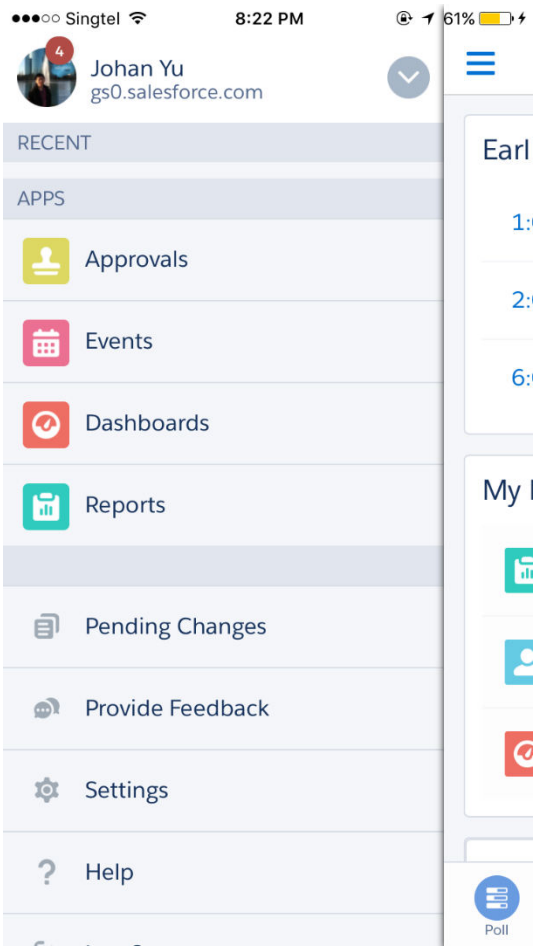
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Job Name ↓	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage | Del	rollup_m0090000000k9hz	Bob, Jack	02/07/2016 07:44	26/05/2017 08:00	27/05/2017 08:00	Scheduled Apex
Manage | Del	Rollup Helper Exception Monitor	Rollup Helper	06/01/2016 17:14	26/05/2017 23:00	27/05/2017 23:00	Scheduled Apex
Del	Rollup Batch Agent - Hourly	Rollup Helper	26/05/2017 23:00	27/05/2017 07:00	27/05/2017 08:00	Scheduled Apex
Del	Opportunity Snapshot	Bob, Jack	24/05/2017 22:26	26/05/2017 23:11	27/05/2017 23:11	Reporting Snapshot

STAGE ↑	EXECUTION TIME	RECORD COUNT	TOTAL AMOUNT	RUNNING USER ID
Closed Lost (3 records)	24/05/2017 23:11	3.00	USD 9,900.00	005900000000OjrD
	25/05/2017 23:11	3.00	USD 9,900.00	005900000000OjrD
	26/05/2017 23:11	4.00	USD 109,900.00	005900000000OjrD
Closed Won (3 records)	24/05/2017 23:11	25.00	USD 1,092,612.92	005900000000OjrD
	25/05/2017 23:11	25.00	USD 1,092,612.92	005900000000OjrD
	26/05/2017 23:11	25.00	USD 1,092,612.92	005900000000OjrD
Id. Decision Makers (3 records)	24/05/2017 23:11	5.00	USD 208,807.20	005900000000OjrD
	25/05/2017 23:11	5.00	USD 208,807.20	005900000000OjrD
	26/05/2017 23:11	5.00	USD 208,807.20	005900000000OjrD
Needs Analysis (3 records)	24/05/2017 23:11	34.00	USD 565,387.00	005900000000OjrD
	25/05/2017 23:11	35.00	USD 575,387.00	005900000000OjrD
	26/05/2017 23:11	35.00	USD 575,387.00	005900000000OjrD
Negotiation/Review (3 records)	24/05/2017 23:11	2.00	USD 117,500.00	005900000000OjrD
	25/05/2017 23:11	2.00	USD 117,500.00	005900000000OjrD
	26/05/2017 23:11	1.00	USD 17,500.00	005900000000OjrD
Perception Analysis (3 records)	24/05/2017 23:11	2.00	USD 8,499.00	005900000000OjrD
	25/05/2017 23:11	3.00	USD 28,499.00	005900000000OjrD
	26/05/2017 23:11	3.00	USD 28,499.00	005900000000OjrD

Chapter 12: Dashboards and Reports in the Salesforce1 Mobile App

s



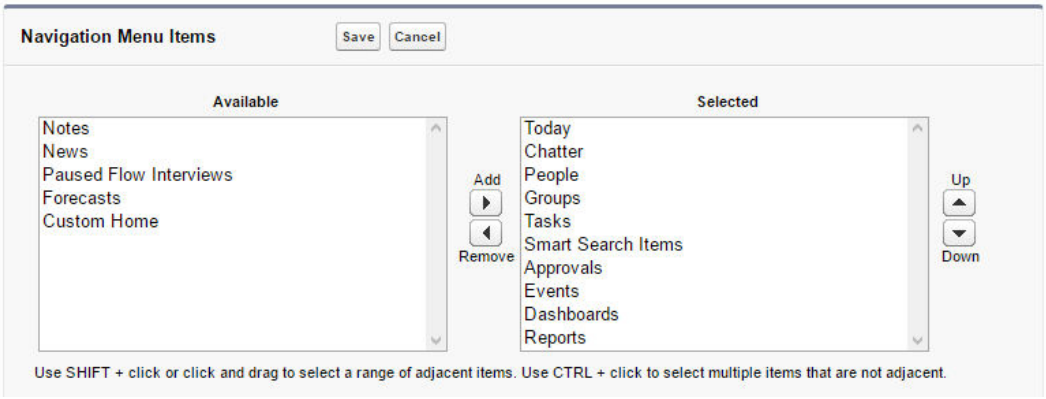
Mobile Navigation

Help for this Page

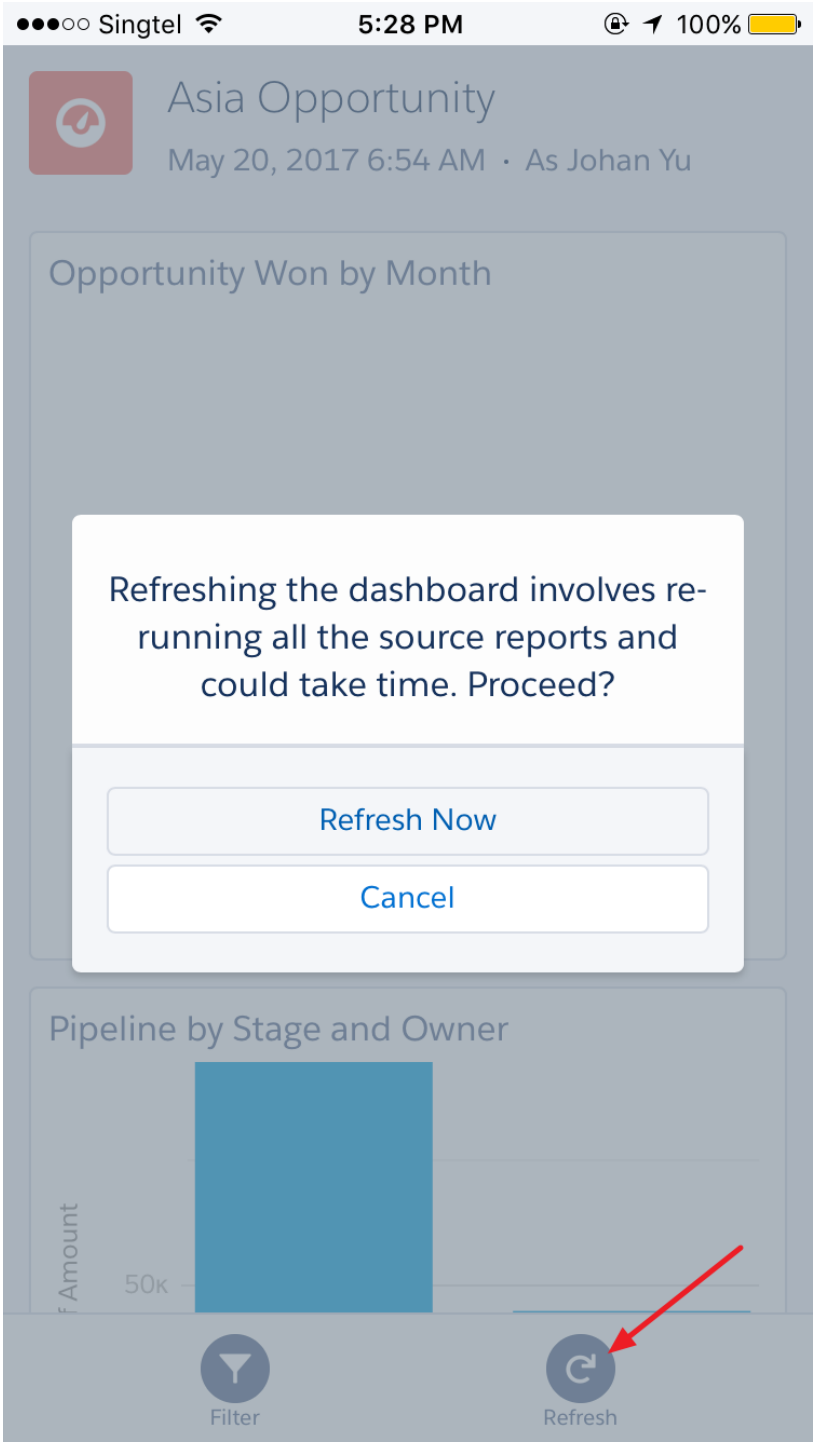
Add Salesforce productivity items, smart search items, Visualforce tabs, or Lightning Page tabs to the Salesforce1 navigation menu.

When organizing the menu items, put the items that users will want most at the top. The first item in the Selected list becomes the Salesforce1 landing page for users. The Smart Search Items element can expand into a set of eight or more menu items in Salesforce1, and it may push other elements below the scroll point if you put it near the top of the menu. Anything you put below the Smart Search Items element will appear in the Apps section of the navigation menu.

The Today menu item is only available for the Salesforce1 downloadable app.



iPad
10:26 PM
24%
8
Asia Opportunity (Dynamic)
May 28, 2017 10:05 PM · As Johan Yu
Pipeline by Stage and Owner
100%
50%
0%
Sum of Amount (%)
Value Proposition
Qualification
Negotiation/Revi...
Id. Decision Mak...
Proposal/Price Q...
Prospecting
Stage
Opportunity Owner
Johan Yu
Alvin Lee
Opportunity Won by Month
100k
50k
0
Sum of Amount
120k
120k
90k
88k
72k
40k
2
1
0
Record Count
February 2016
June 2016
May 2016
January 2016
March 2016
April 2016
Close Date
Measure
Sum of Amount
Record Count
Pipeline by Stage and Owner
200k
0
Sum of Amount
Value Proposition
Qualification
Negotiation/Revi...
Id. Decision Mak...
Proposal/Price Q...
Prospecting
Stage
Opportunity Owner
Johan Yu
Alvin Lee
Pipeline by Stage and Age
200k
0
Sum of Amount
0
2
4
Record Count
Stage
Qualification
Value Proposition
Id. Deci
Open Opportunities
My title
Sum of Amount
0
200k
Total Pipeline
4.5M
≥ 67
Filter
Refresh
View As


●●●○○ Singtel
5:28 PM
100%
Asia Opportunity
May 20, 2017 6:54 AM · As Johan Yu
Opportunity Won by Month
Refreshing the dashboard involves re-running all the source reports and could take time. Proceed?
Refresh Now
Cancel
Pipeline by Stage and Owner
50K
Filter
Refresh

Search
5:44 PM
100%
7
Asia Opportunity (Dynamic)
May 28, 2017 5:41 PM • As Johan Yu
Pipeline by Stage and Owner
100%
50%
0%
Sum of Amount (%)
Value Proposition
Qualification
Negotiation/Revi...
Id. Decision Mak...
Proposal/Price Q...
Prospecting
Stage
Opportunity Owner
Johan Yu
Alvin Lee
Opportunity Won by Month
100K
120K
120K
90K
88K
2
Filter
Refresh
View As

●●●○○ Singtel
5:37 PM
100%
7
Asia Opportunity
May 28, 2017 5:28 PM · As Johan Yu
Pipeline by Stage and Owner
100%
50%
0%
Sum of Amount (%)
Value Proposition
Qualification
Negotiation/Revi...
Id. Decision Mak...
Proposal/Price Q...
Prospecting
Stage
Opportunity Owner
Johan Yu
Alvin Lee
Opportunity Won by Month
100K
120K
120K
90K
88K
2
Filter
Refresh

●●●○○ Singtel
7:59 AM
71%
2
Opportunity Won by Month
100K
50K
0
Sum of Amount
120K
120K
90K
88K
72K
40K
2
1
0
Record Count
February 2016
June 2016
May 2016
January 2016
March 2016
April 2016
Close Date
Measure
Sum of Amount
Record Count
Pipeline by Stage and Owner
Sum of Amount
200K
0
Prospecting

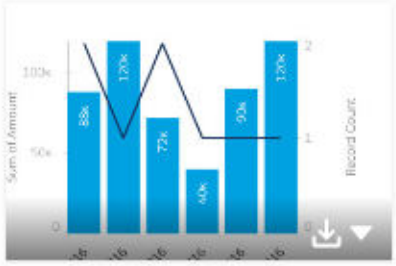
●●●○○ Singtel
9:54 PM
85%
8
Opportunity Won by Month
100K
50K
0
Sum of Amount
Record Count
2
1
0
88K
120K
72K
40K
90K
120K
January 2016
February 2016
March 2016
April 2016
May 2016
June 2016
Close Date
Measure
Sum of Amount
Record Count
Opportunity Won by Month
Opportunity ...
Type
Lead Sour
Grand Hot... SLA
New Customer
External R
United Oil ... ions
Existing C ... ment
Partner
Refresh
Share

●●●○○ Singtel
9:54 PM
85%
Cancel
Snapshot
Share
Check this Dashboard @[Alvin Lee]
@[Automotive Group]
100K
50K
0
Sum of Amount
Record Count
2
1
0
88K
120K
72K
40K
90K
120K
January 2016
February 2016
March 2016
April 2016
May 2016
June 2016
Close Date
Measure
Sum of Amount
Record Count

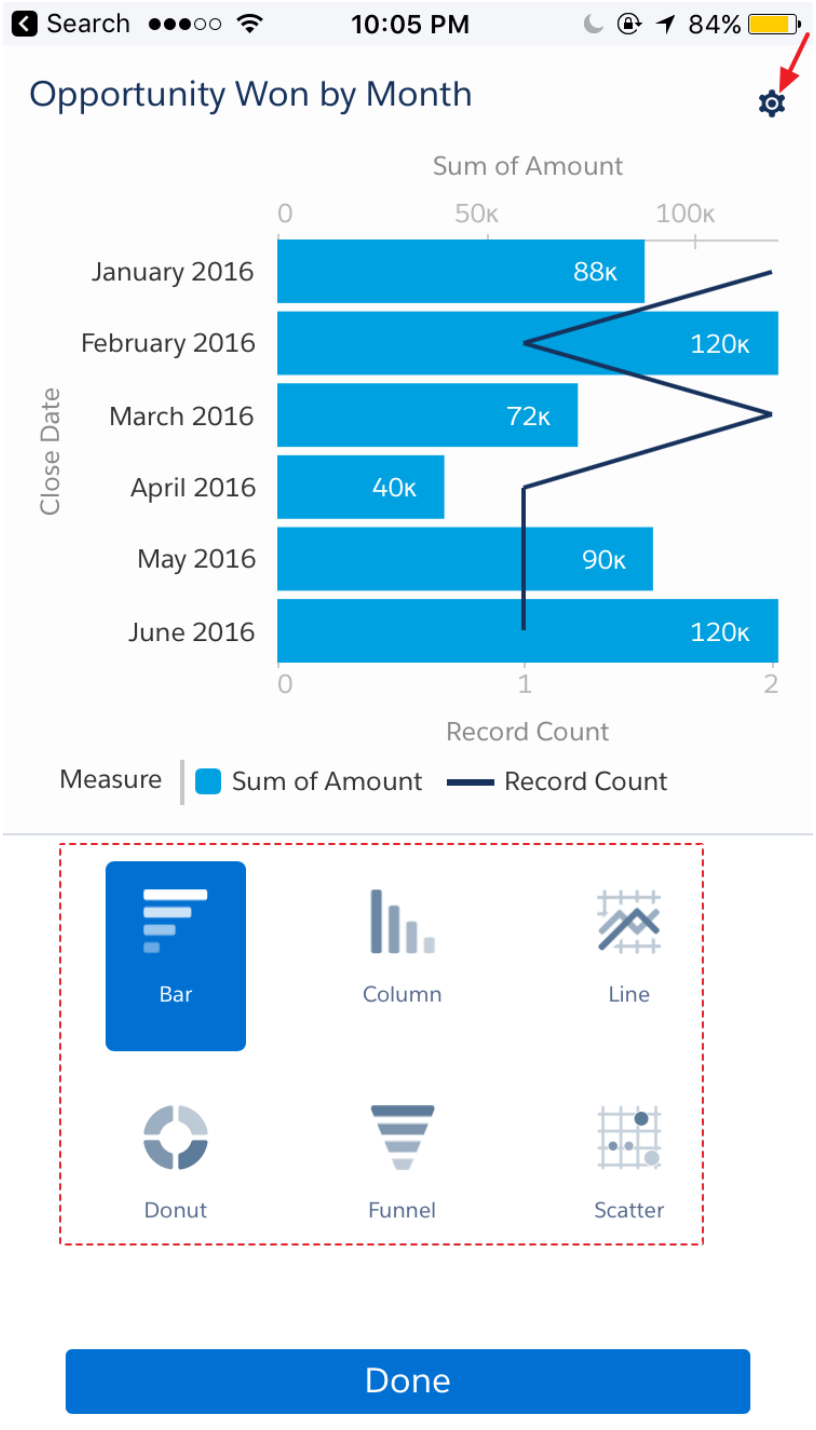
Johan Yu
9m ago

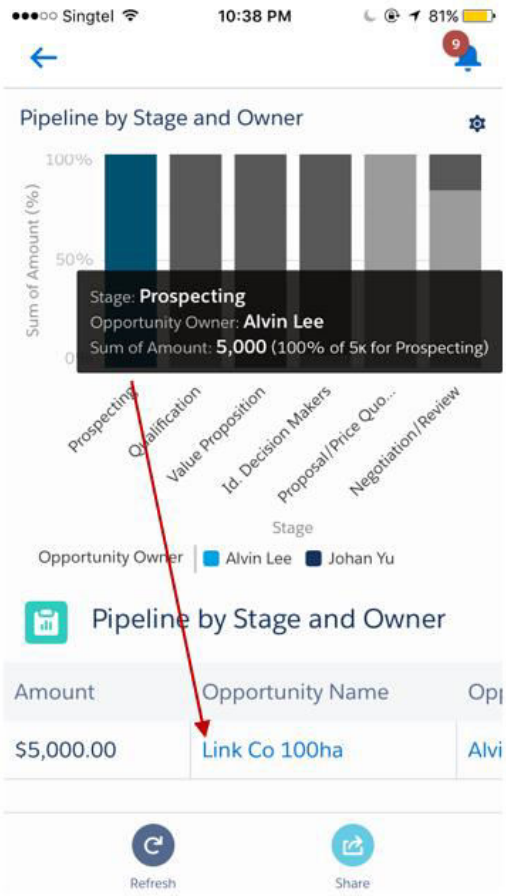
@Automotive Group post to group

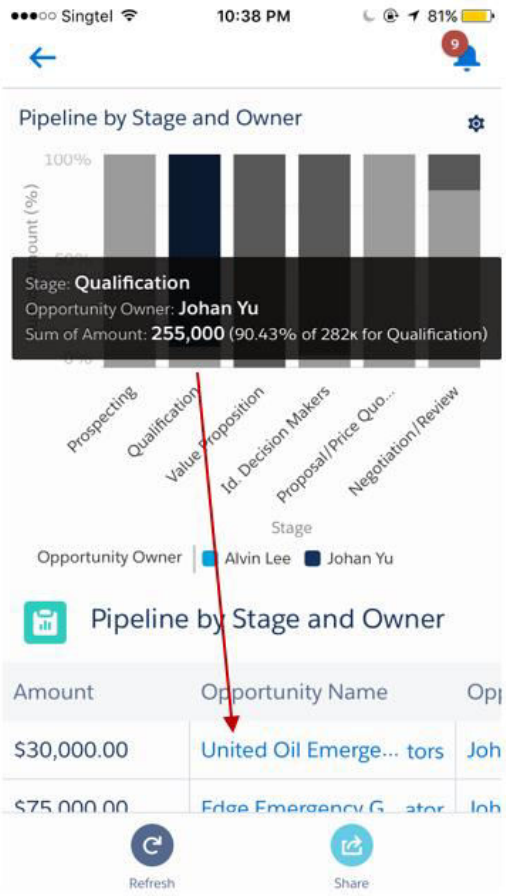
Dashboard: Asia Opportunity (Dynamic)
https://gs0.lightning.force.com/one/one.app#/sObject/01ZB0000000Q8cfMAC/view



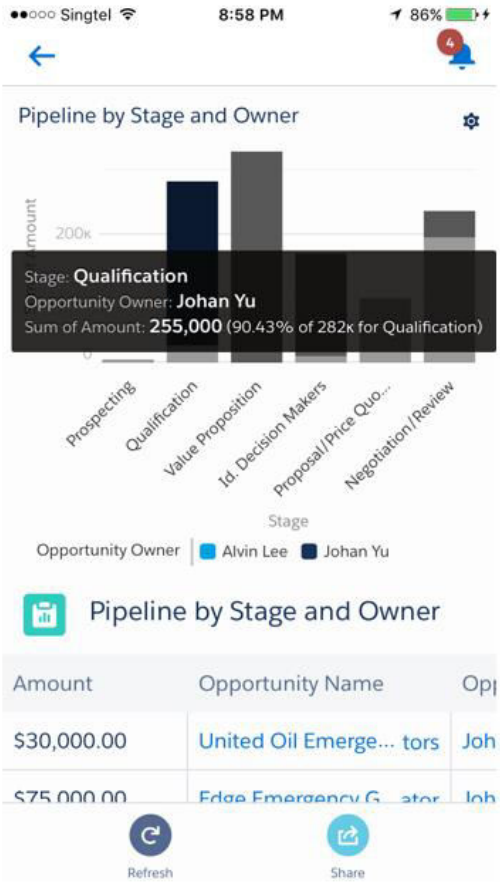
Like Comment Share


Search
10:05 PM
84%
Opportunity Won by Month
Sum of Amount
0
50K
100K
January 2016
88K
February 2016
120K
March 2016
72K
April 2016
40K
May 2016
90K
June 2016
120K
Close Date
0
1
2
Record Count
Measure
Sum of Amount
Record Count
Bar
Column
Line
Donut
Funnel
Scatter
Done


Singtel
10:38 PM
81%
9
Pipeline by Stage and Owner
100%
50%
0
Sum of Amount (%)
Stage: Prospecting
Opportunity Owner: Alvin Lee
Sum of Amount: 5,000 (100% of 5K for Prospecting)
Prospecting
Qualification
Value Proposition
Id. Decision Makers
Proposal/Price Quo...
Negotiation/Review
Stage
Opportunity Owner
Alvin Lee
Johan Yu
Pipeline by Stage and Owner
Amount
Opportunity Name
Opp
$5,000.00
Link Co 100ha
Alvi
Refresh
Share


Singtel
10:38 PM
81%
9
Pipeline by Stage and Owner
100%
Stage: Qualification
Opportunity Owner: Johan Yu
Sum of Amount: 255,000 (90.43% of 282K for Qualification)
Prospecting
Qualification
Value Proposition
Id. Decision Makers
Proposal/Price Quo...
Negotiation/Review
Stage
Opportunity Owner
Alvin Lee
Johan Yu
Pipeline by Stage and Owner
Amount
Opportunity Name
Opp
$30,000.00
United Oil Emerge... tors
Joh
Refresh
Share

●●●○○ Singtel
8:29 PM
66%
4
Account by Type
Account Own...
Account Name
Last
Johan Yu
GenePoint
5/2
Alvin Lee
United Oil & Gas, UK
4/1
Johan Yu
United Oil & Gas, ... pore
5/2
Johan Yu
Edge Communications
5/4
Johan Yu
Burlington Textiles ... rica
5/4
Johan Yu
Pyramid Constructi... Inc.
5/1
Johan Yu
Dickenson plc
5/2
Johan Yu
Grand Hotels & Re... Ltd
5/4
Johan Yu
Express Logistics a... port
5/4
Alvin Lee
University of Arizona
5/2
Alvin Lee
United Oil & Gas Corp.
5/6


Singtel
8:58 PM
86%
Pipeline by Stage and Owner
200k
Stage: Qualification
Opportunity Owner: Johan Yu
Sum of Amount: 255,000 (90.43% of 282k for Qualification)
Prospecting
Qualification
Value Proposition
Id. Decision Makers
Proposal/Price Quo...
Negotiation/Review
Stage
Opportunity Owner
Alvin Lee
Johan Yu
Pipeline by Stage and Owner
Amount
Opportunity Name
$30,000.00
United Oil Emerge... tors
$75,000.00
Refresh
Share

Singtel
8:58 PM
86%
Pipeline by Stage and Owner
200k
Stage: Value Proposition
Opportunity Owner: Johan Yu
Sum of Amount: 330,000 (100% of 330k for Value Proposition)
Prospecting
Qualification
Value Proposition
Id. Decision Makers
Proposal/Price Quo...
Negotiation/Review
Stage
Opportunity Owner
Alvin Lee
Johan Yu
Pipeline by Stage and Owner
Amount
Opportunity Name
$80,000.00
Express Logistics P... tors
$250,000.00
Refresh
Share