# Chapter 15

# Analyzing Data with Reports

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*In This Chapter*

▶ Defining reports

▶ Creating reports

▶ Printing reports

▶ Exporting to Excel

▶ Organizing your reports

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*H*ow much time do you waste every week trying to prepare reports for your manager, your team, or yourself? You have to chase the information down, get it into a useful format, and then hopefully make sense of the data. By the time you've done all this, the information is probably already outdated despite your best efforts. Have you ever felt less than confident with the details or the totals?

If this sounds like a familiar problem, you can use reports in salesforce.com to generate up-to-the-moment data analysis to help you measure your business. As long as you and your teams regularly use salesforce.com to manage your accounts, opportunities, and other customer-related information, you don't have to waste time wondering where to find the data and how to consolidate it — instead, salesforce.com does that work for you.

And unlike other applications where the business users often have to spend precious time relying on more technical people to build their custom reports, you can do this all by yourself in minutes, with no geeky programming. With an easy-to-use reporting wizard, you can customize existing reports or build them from scratch according to your specific needs. And then, if you want to export reports to Excel or print them, just click a button.

In this chapter, I show you how to use existing reports as launching pads to developing your own reports. This includes looking over the standard reports provided by salesforce.com, and then building reports from scratch, and also

modifying existing reports to make them your own. Within a report, I take you through the different ways you can limit the report to get just the information that's necessary for creating a clearer picture of your business. Finally, because you're going to love the Reports tab so much, be sure to check out my explanation on how to keep your reports organized in easy-to-find folders as your universe of reports expands.

# Discovering Reports

All your available reports are accessible from the Reports home page. With reports, you can present your data in different formats, select a seemingly infinite number of columns, filter your data, and subtotal information, just to name a few features. And like other pages in salesforce.com, you can quickly find the details. So for example, you can go from the Reports home page to a lead report to a lead record simply by clicking links.

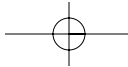## Navigating the Reports home page

When you click the Reports tab, a list of all your available reports appears, sorted by folders. Salesforce.com comes standard with a set of predefined reports and folders (as shown in Figure 15-1) that are commonly used for measuring sales, marketing, support, and other functions.

**TIP**

You can't save a custom report in a standard folder. If you're an administrator, consider creating custom folders for your important functional areas that ultimately replace these standard folders.



**Figure 15-1:** Looking over the standard folders and reports.

From this page, you can do the following:

✔ Click the green arrow on the left side of a folder to hide or show a folder's reports.

✔ Click the gray arrows on the right side of a folder to move a folder up or down on the page. For example, if you want to see the Lead Reports folder at the top of the page, simply click its gray Up arrow to move the folder up one position at a time.

✔ To display the report, click a report title. Either the report appears or you see a wizard that you need to follow to generate the report.

✔ On custom reports, click the Edit, Del, or Export links to edit or delete a report or export its data to Excel.

✔ Click the Create New Custom Report button to start the report wizard.

✔ If you have permission to manage public reports, click the Report Manager button to organize reports.

## Displaying a report

When you click a report title or run a report from the wizard, a report page appears based on the criteria that was set. For example, under the Opportunities and Forecast Reports folder, click the Opportunity Pipeline link. The Opportunity Pipeline report appears, as shown in the example in Figure 15-2. This report is one of the most-used standard reports in salesforce.com.

A basic report page in salesforce.com is broken up into two or three parts:

✔ **Report Options:** This section is at the top of the page. You can use it to filter and perform other operations on a report. For details on report options, see "Filtering on a Report" later in this chapter.

✔ **Generated Report:** This section shows the report itself. What's visible depends on the construction of the report and what you have permission to see in salesforce.com. See Chapter 17 for more details on sharing.

✔ **Org Drill Down:** You can use this area above the Report Options section to quickly limit results based on role hierarchy. See Chapter 17 for steps on setting up the role hierarchy.

In the Generated Report section, you can click a column heading to quickly re-sort your report by the selected column.

**Figure 15-2:**
Displaying
a report.

# Developing Reports with the Wizard

Salesforce.com comes with a huge menu of useful reports, and yet they might
not be exactly what you're looking for. For example, if your company has
added custom fields on the account record that are unique to your customer,
a standard New Accounts report doesn't show you all the information you
want to see on recent accounts.

The next time you need a custom report, don't pester the IT geeks. Instead,
use the report wizard to build a new report or customize an existing one.

## Building a report from scratch

You don't have to be a technical guru to create a report in salesforce.com.
Just make sure you can articulate a question that you're trying to answer, and
then salesforce.com's Report Wizard will guide you through the steps for cre-
ating a custom report that will help you answer the question. Anyone who
can view the Reports tab can create a custom report. Whether you can make
it public or just private depends on permissions.

To create a report from scratch, click the Reports tab and follow these steps:

1. **Click the Create New Custom Report button.**

   The Report Wizard page appears.

2. **Select the data type you want to report on, and then click Next.**

   You do this by first selecting the basic type of data from the drop-down list and then being more specific in the dependent list box, as shown in Figure 15-3. When you click Next, Step 1 of the wizard appears.

3. **Select the radio button for the type of report that you want. You have three options:**

   • **Tabular Reports** provide the most basic way to look at your data in a tabular format.

   • **Summary Reports** allow you to view your data with subtotals and other summary information.

   • **Matrix Reports** enable you to create reports in grids against both horizontal and vertical categories. This type of report is particularly helpful for comparing related totals, especially if you're trying to summarize large amounts of data. For example, the standard report called Sales to Date versus Last Month (located in the Opportunity and Forecast Reports folder) is a matrix report that summarizes new sales by month vertically and also by close date horizontally.

4. **When you're done, select the Select Columns option from the Jump to Step drop-down list in the top-right corner, and then click Next.**

   The Select the Report Columns page appears.

   The report type that you select dictates how many of the seven possible Report Wizard steps you see and the order that they're presented in the wizard. For example, if you selected the Matrix Report radio button in Step 3 of this list, the next step out of seven is Select Groupings. But if you select the Tabular Reports radio button, the next step is Select Columns, and you have only five steps. And at any time, you can use the Jump to Step drop-down list to skip around the wizard.



**Figure 15-3:** Defining the data type for the report.

5. **Select the check boxes for the columns that you want in your report.**

   Depending on the data type you chose, the Select the Report Columns page displays standard and then custom fields divided into sections, as shown in the example in Figure 15-4.

6. **When you're done, select the Select Columns to Total option from the Jump to Step drop-down list.**

   A wizard page appears with the columns that can be totaled (such as currencies, amounts, and percentages) based on the columns you selected in Step 5 of this list.

7. **Select check boxes for columns that you want summarized and how you want them summarized.**

   Salesforce.com provides you options for summing, averaging, and choosing highest or lowest values. For example, on an activity report, you could use averaging to measure the average duration of an activity, as shown in the example in Figure 15-5.
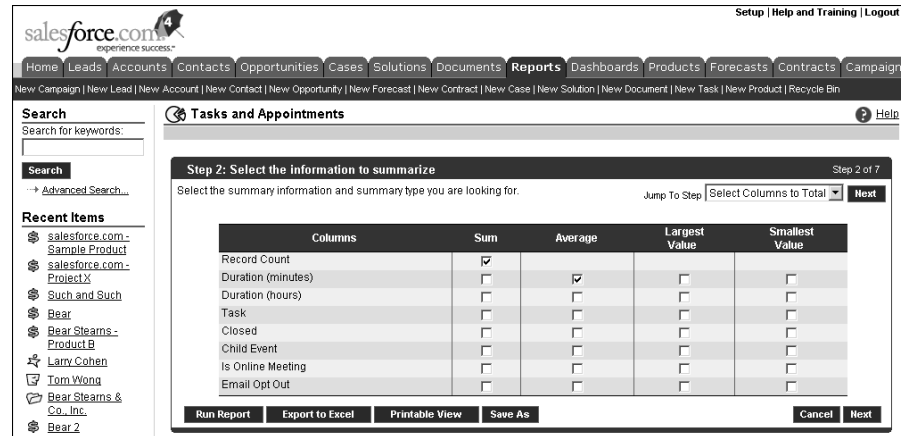
8. **When you're done, select the Order Columns option from the Jump to Step drop-down list and click Next.**

   The wizard page appears.



**Figure 15-4:**
Selecting columns.

**Figure 15-5:**
Choosing
columns
to total.

9. **Click the directional arrows to order the columns.**

   This is how columns will appear on the report from left to right if you are showing all details.

10. **When you're done, select the Select Criteria option from the Jump to Step drop-down list and click Next.**

    The wizard page appears.

11. **Use the criteria filters to limit results on your report.**

    The standard filters will vary based on the data type you chose. For advanced filters, select fields and operators by using the drop-down lists, and then enter values, similar to creating custom views. (For help with advanced filters, see Chapter 2.)

    With advanced And/Or filters you can now create precise reports that might include complex conditions. For example, if you define strategic accounts as companies that did either over $1 billion in annual revenue or had over 500 employees plus $500 million in annual revenue, you can now generate this report. To do this, enter your advanced filters as before, and then click the Advanced Options link at the bottom of the Advanced Filters section. When the page reappears, click the Tips link located next to the Advanced Filter Conditions field. Modify your Conditions as recommended before clicking the Run Report button. (You must have Professional or Enterprise Edition.)

12. **When you're done, select the Select Groupings option from the Jump to Step drop-down list and click Next.**

    The wizard page appears.

13. **Select the columns by which your report will be grouped.**

    For example, if you want to measure the number of accounts owned by rep and subtotaled by account type, use an account matrix report. For the

row headings, first sort by Account Owner, and then by Account Name. Then for the column headings, sort by Type, as shown in Figure 15-6.

**14. When you're done, select the Select Chart Type option from the Jump to Step drop-down list and click Next.**

The wizard page appears.

**15. Complete the fields to build a chart, and then click the Run Report button.**

Many users include this step only if they need to generate a specific chart or graph to support the report. See Chapter 16 for specific details on building charts in dashboards or reports. When you click the Run Report button, the custom report appears with Report Options at the top and the actual report data displayed under the Generated Report heading.

**16. If you want to save the report, click the Save As button.**

A New Custom Report page appears.

**17. Complete the fields and click the Save As button.**

Here are pointers for completing the fields:

- Enter a title for the report in the Report Name field.

- Type a question or sentence in the Report Question field that will help you remember the purpose of the report. For example, if you created an Opportunity by Competitor report, you might type **Who are our biggest competitors measured by opportunities?**

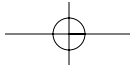- If you have permissions to manage public folders, select a folder for the report.

After clicking the Save As button, the Reports home page appears with a link to the report under the selected folder.



**Figure 15-6:** Determining the groupings.

## Customizing existing reports

A fast and easy way to generate reports is to customize from an existing report. For example, if you like the standard Pipeline Report but you want to modify the columns, you can simplify work from the existing report.

To customize an existing report, go to the Reports tab and follow these steps:

1. **Click a link for an existing report.**

   The report appears.

2. **Click the Customize button.**

   A page from the report wizard appears.

3. **Based on what you want to customize, select a step from the Jump to Step drop-down list.**

   The wizard page appears based on what you selected.

4. **Modify the fields within that step to customize your report.**

   For example, if you want an opportunity report with only forecasted opportunities, select the Select Criteria option from the Jump to Step drop-down list. Then add an advanced filter, such as Forecast Category Equals Commit. (Forecast Category is the field, Equals is the operator, and Commit is the value.)

5. **Continue jumping to steps until you're satisfied, and then click the Run Report button.**

   The report appears modified based on your settings from the wizard.

6. **When you're done, click Save or Save As.**

   The Save button replaces the prior report. The Save As button saves a new one. In either case, a page appears to save the report.

7. **Complete the fields and click Save.**

   The Reports home page appears.

# Filtering on a Report

Over time, you'll develop core reports that have the columns that you want in a format that makes sense to you. One of the huge benefits of reporting in salesforce.com is that you can use existing reports on the fly and apply report options to limit or reorder the report results. For example, with the standard Pipeline Report, you might want to sort by Opportunity Owner instead of Stage; look at only one region; or look at three quarters instead of one.

All those options and more are possible in seconds without having to use the Customize button. In this section, I show you how to filter your reports with tools that include the Org Drill Down feature, the Report Options section, and enhanced drill down and break out options.

## Using the Org Drill Down feature

In Enterprise, Professional, and Team Editions of salesforce.com, many reports display an Org Drill Down feature that you can use to view information by users, roles, or the entire organization.

**TIP**

What data is accessible might be limited by your role in the organization and sharing rules, but by using the Org Drill Down feature, you can quickly analyze information specific to your teams. (See Chapter 17 for more details on role hierarchy and sharing.)

You can use the Org Drill Down feature primarily with opportunity, forecast, and activity reports. To use the Org Drill Down features, click Reports tab and follow these steps:

**1. Click a report in the Activity Reports or Opportunity and Forecast Reports folders.**

For all but three to four reports, the report appears with a set of Org Drill Down links, as shown in the example in Figure 15-7. The titles of your links vary based on the role hierarchy set by your administrator.

**TIP**

If you don't see the Org Drill Down feature, you might still see a drop-down list under the Report Options section that allows you to report on your teams. For example, on the Reports home page, click the Opportunity History Report link under the Opportunity and Forecast Reports folder. The report appears, and under the Report Options section, use the Relationship to Opportunity drop-down list to filter data on your teams (as defined by role hierarchy or sales teams). See Chapter 9 for further details on setting up sales teams.

**2. Click a link to the right of the Org Drill Down title.**

The report reappears based on your selection, and the links above the Org Drill Down title display your current view. Notice that the links to the right of the Org Drill Down title might provide you other choices to drill down further into your team.

**3. Repeat the Step 2 as often as needed until you get your desired view.**

Notice that you haven't changed the underlying report but just limited the view.

**REMEMBER**

If you don't see the information you expect to as you click through the Org Drill Down feature, consult your administrator. Nine out of ten times, the problem might just be that the role hierarchy is set up incorrectly or you're assigned to the wrong role.

**Figure 15-7:**
Viewing the
Org Drill
Down
feature.
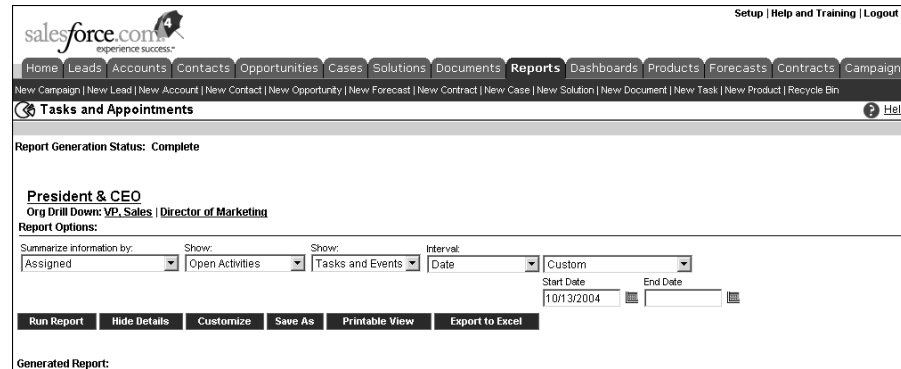
# Using the Report Options section

When you open a report, it appears with a variety of filters in the Report
Options section at the top of the page. By using the filters in the Report Options
section, you can look at your data from multiple angles based on your needs.

The available standard filters depend on the type of report that you selected.
For example, click the Lead Status link under the Lead Reports folder. The
Lead Status report appears. Look over the Report Options section, and then
click the Back button on your browser. Next click the Sales by Rep link under
the Sales Reports folder. Notice that the standard filters in the Report
Options section differ based on the type of report.

To try out the standard filters in the Report Options section by using the
Opportunity Pipeline report as an example, first go to the Reports home page
and click the Opportunity Pipeline link. The report appears. From the report
you can do the following with the filters in the Report Options section:

✔ From the **Summarize Information By drop-down list,** select a field. For
example, if you want to look at your opportunities by rep, select
Opportunity Owner.

✔ From the **Interval drop-down list,** first select a date field, and then in
the drop-down list to the right select a standard interval or create a
custom range. For example, if you want to look at all opportunities cre-
ated in 2004 to the present, you would first select Created Date, and then
define the interval, as shown in Figure 15-8.

✔ From the **Relationship to Opportunity drop-down list,** select the scope.

✔ Use the **Opportunity Status drop-down list** if you want open and/or
closed records.

✔ Use the **Probability drop-down list** if you want to limit the results by
probability.

**Figure 15-8:**
Using the Report Options section to customize your date range.

At any particular time, click the Run Report button to apply your selected filters. The report reappears based on the filters you defined.

If you ultimately want to save the report, click the Save or Save As buttons and then save the report as usual. (Refer to the section "Building a report from scratch" earlier in this chapter for details on saving.)

## Hiding and showing details

To see a collapsed or expanded view of your report data, use the Hide/Show Details button in the Report Options section. For example, from the Reports home page, click the Sales by Account report under Sales Reports. When the report appears, click the Hide Details button. The report reappears in a collapsed view, and the Hide Details button has morphed into the Show Details button. Now click the Show Details button, and the report expands again. By using Hide Details, you can easily view headings, subtotals, and totals.

## Filtering with the drill down menu

Reports in salesforce.com now have a drill down function that you can use to select rows within a report and instantly break them down by a different field. For example, if you're reviewing an Opportunity by Rep report, you might want to select a specific rep and then sort the rep's opportunities by stage. With enhanced drill down and break out options, you can do this in just a few quick clicks.

To use the drill down and break out options (using Sales by Rep as the
example), follow these steps:

1. **From the Reports home page, click the Sales by Rep link under the
   Sales Reports folder.**

   The report appears.

2. **In the left column of the Generated Report section, select check boxes
   for records you want to view.**

   If you don't see check boxes and you know you've closed opportunities in
   salesforce.com, select an interval in the Report Options section to see all
   your historical opportunities and click Run Report to view more records.

3. **At the bottom of the page, select a field from the Drill Down By drop-
   down list to summarize the information, if desired, and then click the
   Drill Down button, as shown in Figure 15-9.**

   The report reappears based on your selections. For example, if you
   chose the Close Month option from the Drill Down By drop-down list,
   your selected opportunities would be sorted by close month.



**Figure 15-9:**
Using the
enhanced
drill down
and break
out options.

4. **If you want to use the report in the future, click Save or Save As.**

   Then follow the normal directions for saving reports. (See the earlier section "Building a report from scratch" for saving details.)

## Clearing filters

If you have reports with advanced filters, you can easily view and clear the filter to expand the results. For example, if you created and saved the test report in the preceding section, you might want to clear the filter on the selected rep(s) to see all closed opportunities by close month for all reps. The advanced filters, if any, appear just below the Generated Report header on a report page.

To clear a filter, follow these steps:

1. **Click the link for a report that you've applied filters to.**

   The report appears, and your criteria filters are listed under the Filtered By header directly below the Generated Report header.
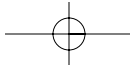
2. **Right below the Filtered By header, click the Clear link to remove a filter, as shown in Figure 15-10.**

   The report reappears displaying a potentially wider universe of data.

3. **Be sure to click the Save or Save As buttons if you want to save this report.**



**Figure 15-10:** Clearing a filter.

> **TIP**
>
> You can quickly modify advanced filters by clicking the Edit link next to the Filtered By header. The Select Criteria page of the report wizard appears.

# Printing and Exporting Reports

Ideally, with salesforce.com, you want to run your reports right out of the application, getting rid of that mad scramble of collecting, combining, and printing data before your next big meeting. However, sometimes you'll want to generate a report and then print it or export it to Excel. Maybe you need to run some complex spreadsheet calculations or you need to plug numbers into an existing macro template. Not a problem. Salesforce.com provides you with both of these capabilities with the click of a button.

## Generating a printable view

How many times have you found a page on the Internet and printed it only to find that the printed result wasn't what it looked like on-screen? With salesforce.com, you don't have that problem. If you develop a report in salesforce.com and you like the format it's in, the printable view lets you translate the on-screen format to the printed page.

To use printable view, click the Reports tab and follow these steps:

1. **Click the link to a report to open it.**

2. **Click the Printable View button.**

   A new window opens, and you can open or save the file.

3. **Follow the steps as desired.**

   When the file opens, the report appears in Excel and in a format that's optimized for printing.

## Exporting to Excel

Salesforce.com wants to rid you of your old habit of manual spreadsheet reporting. When information in salesforce.com is current, running reports in real time gives you the most accurate glimpse into how your business is doing. But salesforce.com isn't trying to eliminate your need to ever use Excel. Quite the contrary: Report functionality in salesforce.com is optimized to work with and export to Excel.

To export a report, click the Reports tab and follow these steps:

1. **Click the link to a report.**

   The report appears. You can bypass this step if you see an Export link next to a report title on the Reports home page.

2. **Click the Export to Excel button.**

   A page appears to define your settings for exporting the file.

3. **Complete the fields and click the Export button.**

   A window appears, prompting you to open or save the file.

4. **Follow the steps as desired.**

   When the file opens, the report data appears in Excel.

5. **Click Done to return to your salesforce.com report.**

   The report page reappears.

Some companies get nervous about certain users having the ability to export company data. If this is a concern and you have Enterprise Edition, you can take one precaution by using custom profiles to eliminate the ability of some users to export to Excel. See Chapter 17 for more details on creating custom profiles.

# Organizing Your Reports

A word to the wise: Reports start multiplying like rabbits as you become addicted to reporting in salesforce.com. Do yourself a favor: Organize your reports from day one and lay out a process for maintaining and deleting reports.

## Building folders with the Report Manager

Nothing is worse than seeing a kazillion reports under the Unfiled Public Reports folder. You start wasting a ridiculous amount of time just identifying which one is the report you want. If you have permission to manage public folders, avoid the headache and impress your peers by using the Report Manager.

With the Report Manager, administrators can create public report folders and control access to custom folders and their reports.
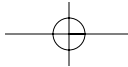
To use the Report Manager, click Reports tab and follow these steps:

1. **Click the Report Manager button at the top of the page.**

   The Report Manager page appears.

2. **Click the Create New Folder link next to the Folder menu.**

   A New Report Folder page appears.

3. **Type a name for the folder in the Report Folder field.**

   For example, if you want a folder for operational reports, you might name it Sales Ops Reports.

4. **Use the Public Folder Access drop-down list to determine read versus read/write privileges to the folder.**

   For example, if you select Read/Write, a user with access to the folder could save over the original report.

5. **Use the two list boxes and the Add/Remove buttons to select reports in the Unfiled Public Reports folder and move them to the new folder.**

6. **Use the radio buttons to select who should have access to the folder.**

   As with other salesforce.com folder tools, your choices amount to all, none, and selective.

7. **If you chose the Selective option in Step 6, use the two list boxes and Add/Remove buttons to highlight groups or roles and move them to the Shared To list box.**

8. **When you're done, click Save.**

   The Report Manager page reappears, and your folder is added to the Folder menu.

## Maintaining your report library

Actually, what's worse than a kazillion reports under Unfiled Public Reports is a universe of reports, some of which are valuable, others of which are useless. Creating public report folders is a good first step, but you might want to apply some of these additional hints on a periodic basis:

- **Accurately name your reports.** You and your users can't know what's behind a report link unless you name it clearly and precisely. And if you misname a report, you either look bad or mislead people.

- **Consider using report numbers within your report names.** For instance, 1.1 Latin America Pipeline. By doing this, managers can refer to report numbers so that everyone's looking at the same report.

✓ **Delete unnecessary reports.** If multiple people in your company have permission to manage public reports, you might want to survey them before accidentally deleting a report. Although you won't be deleting the data, you might eliminate a critical report that involved a lot of thought. At the same time, unnecessary or redundant reports just make it harder for everyone to find what they want.

✓ **Hide folders as necessary.** If you're an administrator, you can do this globally with the Report Manager. If you're a user, you can use the green arrows on the Reports home page to hide folder's contents.

✓ **Update existing reports as needs arise.** For example, if you created an Opportunity Product Report and used an advanced filter like Product Family Equals Software, make sure that you update the report if the product family name changes. Otherwise your reports will be off.

✓ **Use clear report questions.** For example, you might use the Report Question field to summarize certain filters to your report.