Reporting and Integrations

Wilhelmina Aumann and Dylan Watkins' Project

The first part of this project explores the depth of the **reporting tools in Salesforce.**
If you are already familiar with navigating the RAMS org interface, you may skip the first chapter.

The second part of this project will produce a **Proof-of-Concept integration** with one or more third party services. At this time, this part is in the exploration stages. I expect to use **Apex** and **Callout** features in Salesforce to link to our **GiveCampus** sandbox API.

Configure Org Nav Bar

Welcome to RAMS!

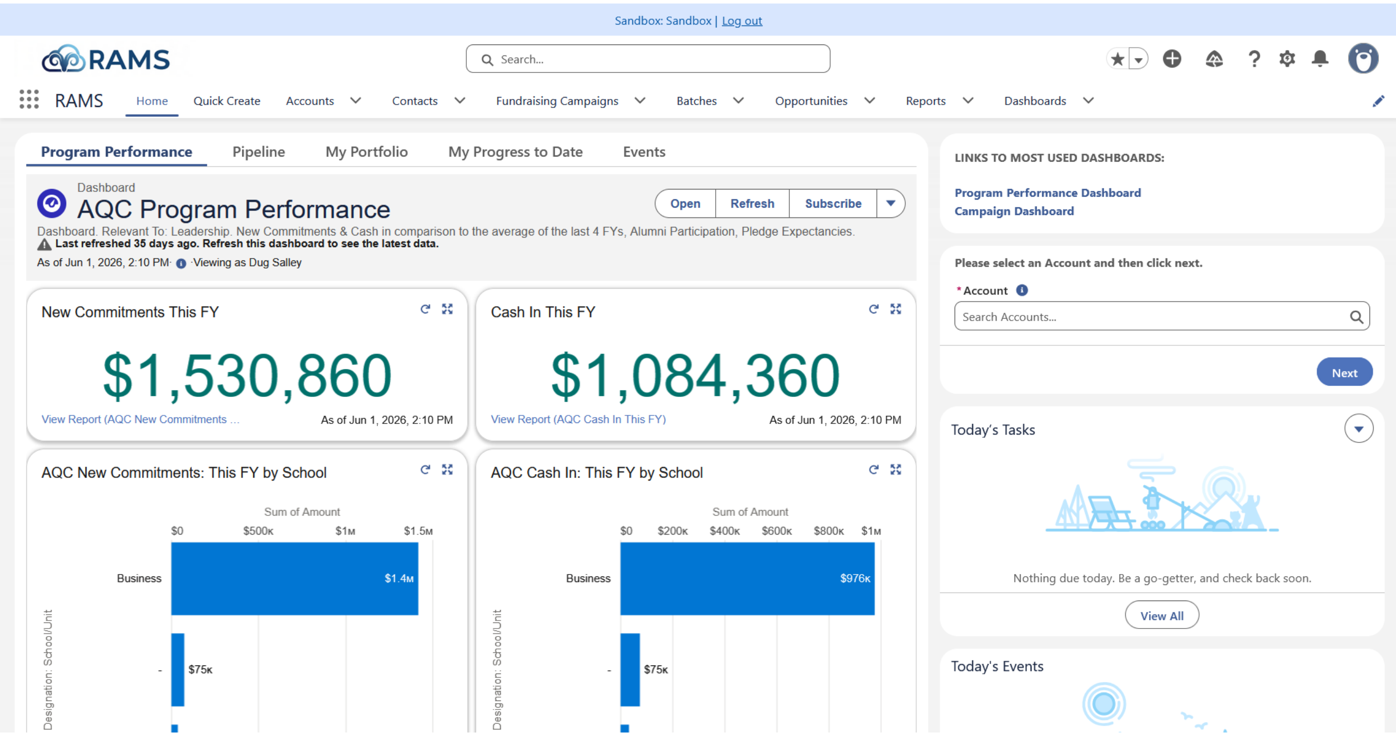
Upon logging in, you will be redirected to the Salesforce org home screen.
It may look slightly different from this early version, but the core functions will be the same.

Navigating to Reports

There are two ways to reach the **Reports** tab.

1. **App Launcher**
2. **Nav bar** shortcuts, such as Reports

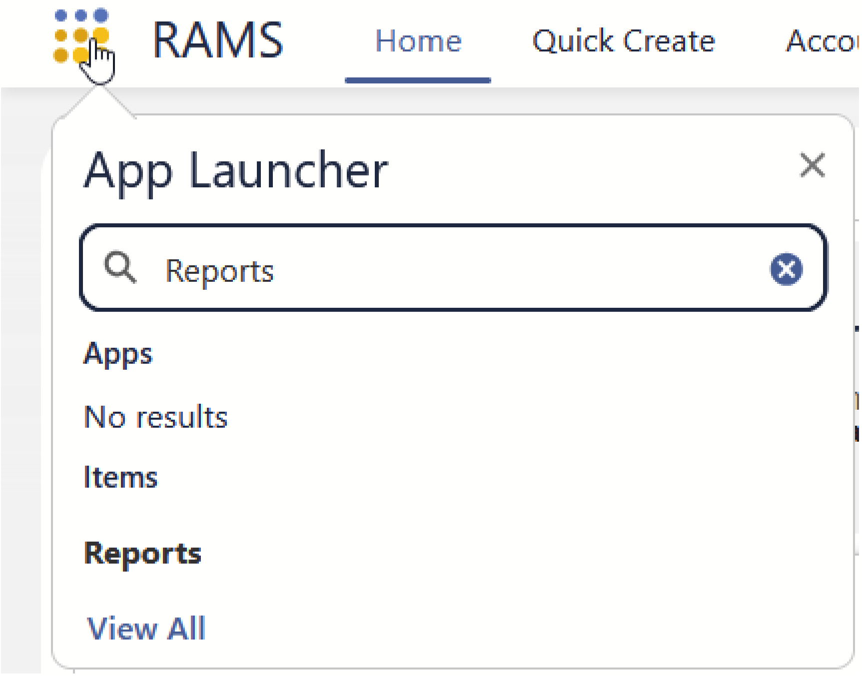
You can find both of these methods on the top white strip of your screen.
By default, Reports is not included on the nav bar.



> Sandbox version with sample data

Using the App Launcher

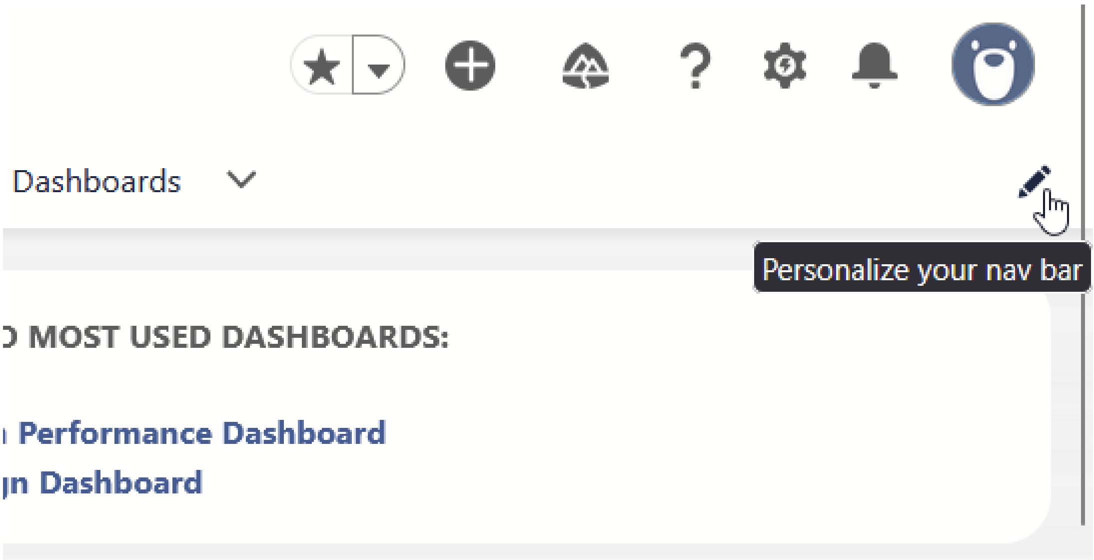
To use the **App Launcher**, click and enter a term in the search box.
Click **Reports** to see all reports and report creation tools.



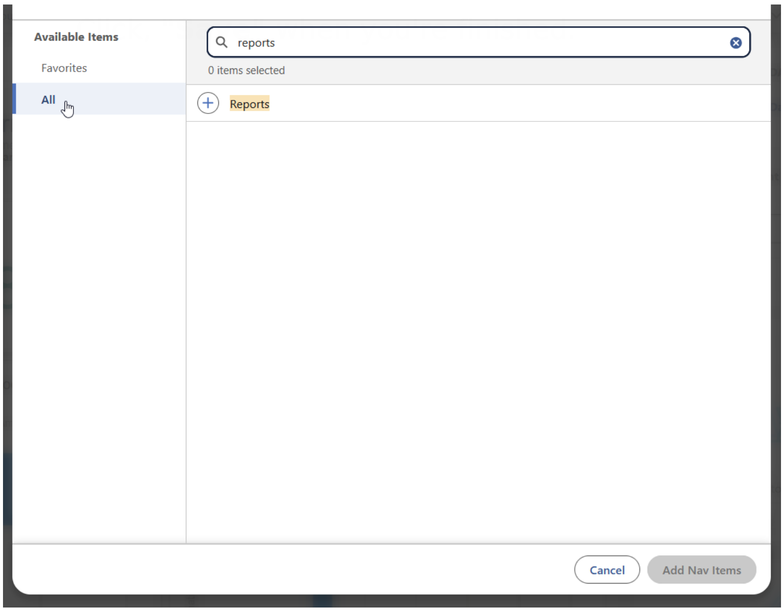
Editing the Nav Bar

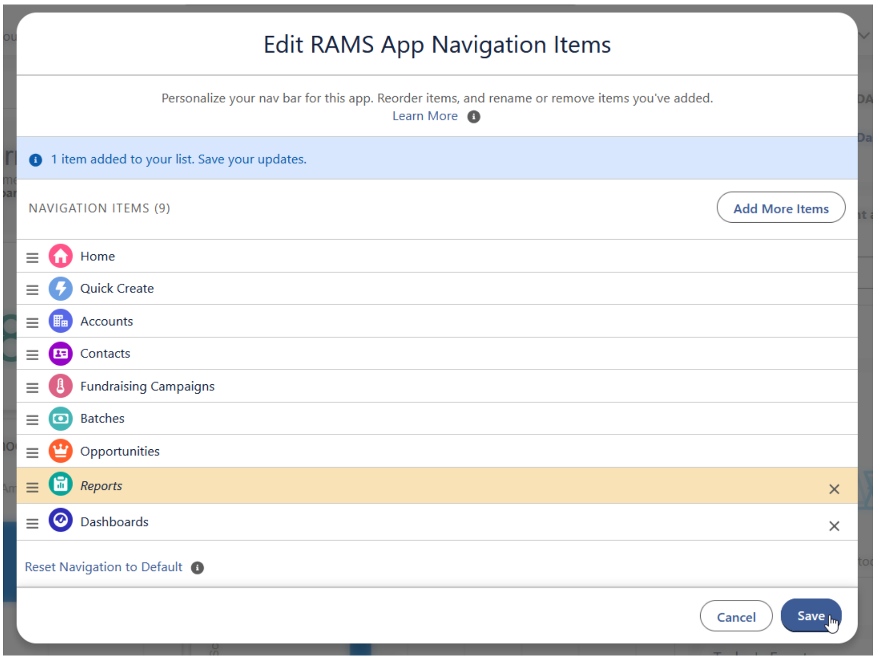
To edit your nav bar,

1. Click at the top right corner and, in the next screen that will pop up, locate the, **"Add More Items"** button.



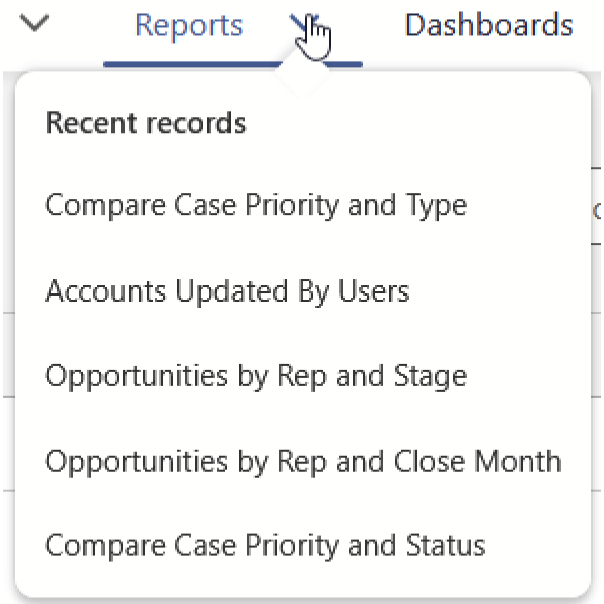
2. On the next screen, **click "All" in Available Items,** then search for any pages, apps, or objects you want in your nav bar.
   Click to select each item.
3. Click, **"Add Nav Items"** in the bottom right corner.
4. Reorder your nav items by clicking and dragging the handles.
   Your nav bar is only attached to your account, so feel free to customize it however you like.





With the **Reports** nav bar shortcut, you can quickly jump to the **Reports** page from anywhere in the org.

See your five most recently viewed reports by clicking the tab chevron.


Reports
Dashboards
Recent records
Compare Case Priority and Type
Accounts Updated By Users
Opportunities by Rep and Stage
Opportunities by Rep and Close Month
Compare Case Priority and Status

Build First Report (Demo)

Guided exercise to show report-building skills with an example.

- ☑ STL
- ☐ Report Type
  - ☐ Objects
  - ☐ Fields
  - ☐ Records
- ☐ Outline Tab
- ☐ Filter Tab
  - ☐ Show Me
  - ☐ Use ***smallest*** applicable date range
- ☐ Joined Report
- ☐ Group by a shared field (Joined)
- ☐ Fields Menu in Joined Reports

Build First Report (Definitions & Notes)

Basic skills to use on any report.

Summarize in Reports

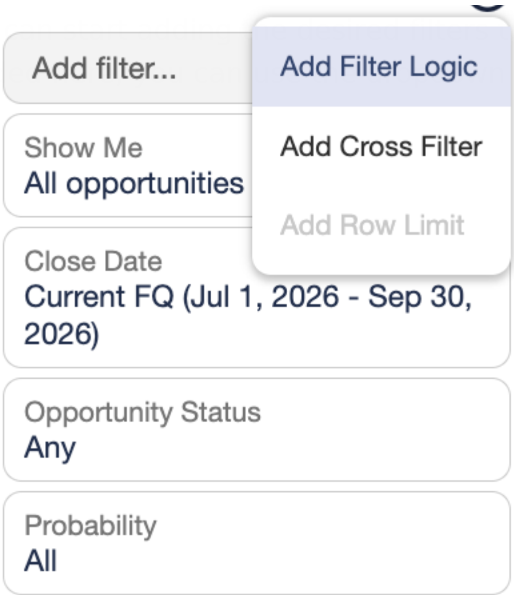
Advanced Report Filtering

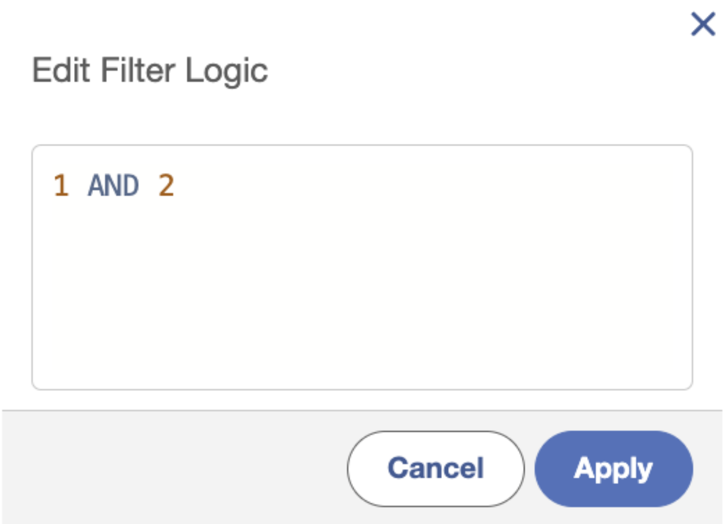
Filter Logic

By default, multiple filters on a report are combined with AND, meaning a record must match every filter to appear. Salesforce reporting provides more flexibility in report creation by allowing you to specify and give priority to certain filters using **Filter Logic**. Thus feature lets you control how filters combine, using AND, OR, and NOT, including parentheses for grouping

Adding Filter Logic

After you start making a report of any object type, y the report on the filter tab. Once at least two filters are a row at the top right of the left panel to select filter logic.





Filter Logic Formulas

Once the filter logic menu is open you will see that the default value of "1 AND 2" will be shown. (If you have more filters those would be listed with AND as well). This is the logic that is usually applied in reporting, where all filters must apply to the record for it to be included in the report. Each added filter is automatically assigned a number based soon order added, this can be grouped in the formula using parentheses.

Accepted terms: AND, OR, NOT

Example	**Record will show when:**
1 AND 2	Both filter 1 and 2 apply.
1 OR 2	Either filter 1, filter 2, or both apply.
NOT(1)	Filter 1 does not apply.

Cross Filters

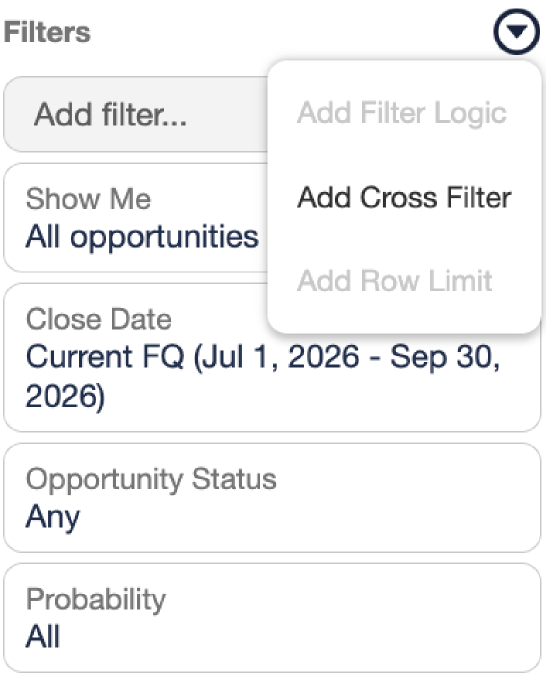
Cross filter is another feature of salesforce reporting that allows you to filter a report based on the presence or absence of related child records. Unlike a standard filter, a Cross Filter does not let you display fields from the child object on the report, it only has the ability to determine whether the parent record qualifies.

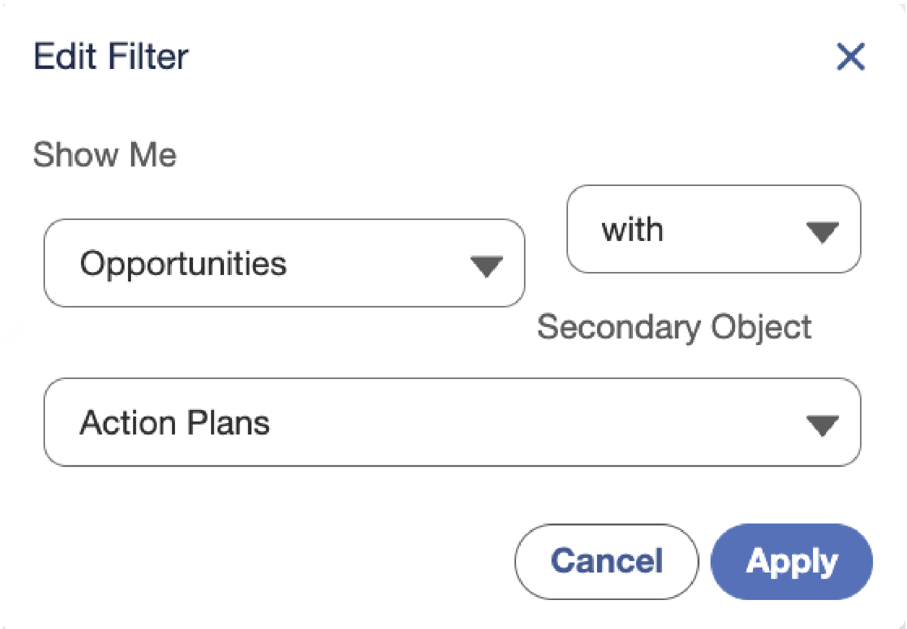
Examples:

1. Show accounts with attached opportunities
2. Show accounts without contacts

Adding a Cross Filter

After you start making a report of any object type, you can add a cross filter by switching to the filters tab and using the dropdown menu to select "Add Cross Filter". This will open a menu allowing you to specify if you want to show records with or without a secondary object attached.





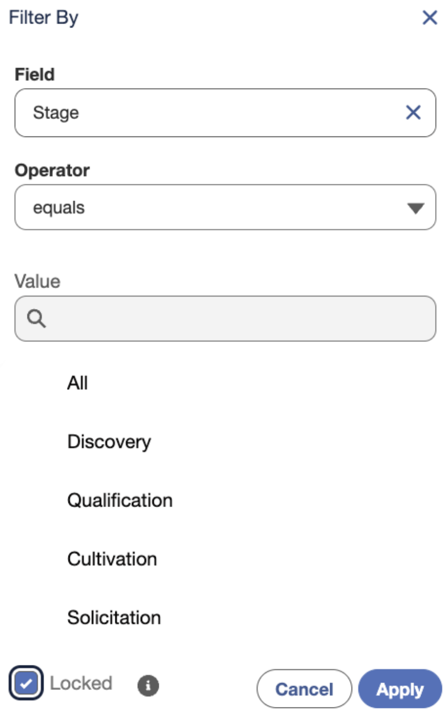
After applying the cross filter and running the report, you should see that the records not matching your cross filter are no longer appearing.

Lock Filters

If you are planning on sharing a record with others, a useful security feature provided by salesforce is the ability to lock filters. Normally, anyone viewing a report can change the filter values on the run page, this can be prevented on more essential reports by simply checking the locked checkbox

How to Lock a Filter

Click the filter you want to lock to edit it (same menu is accessed when creating new filter), and in the bottom left you simply check the "Locked" checkbox. Afterwards just hit apply and your changes will be saved preventing anyone from editing the filter on the run reports page.



Advanced Report Grouping

Advanced Report Formulas

Final Notes on Reporting

concepts that don't fit into any previous categories