

Configure Org Nav Bar

Welcome to RAMS!

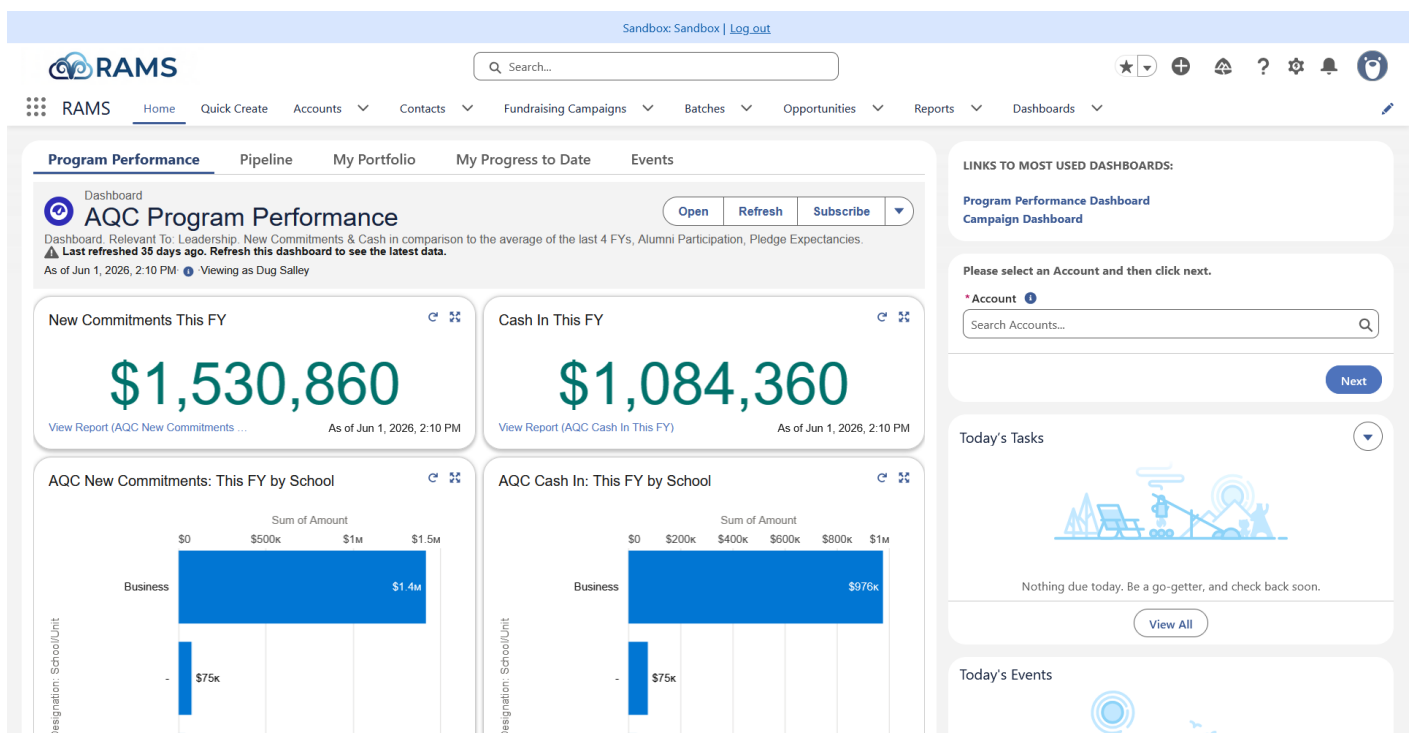
Upon logging in, you will be redirected to the Salesforce org home screen. It may look slightly different from this early version, but the core functions will be the same.

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.



App Launcher

Apps

No results

Items

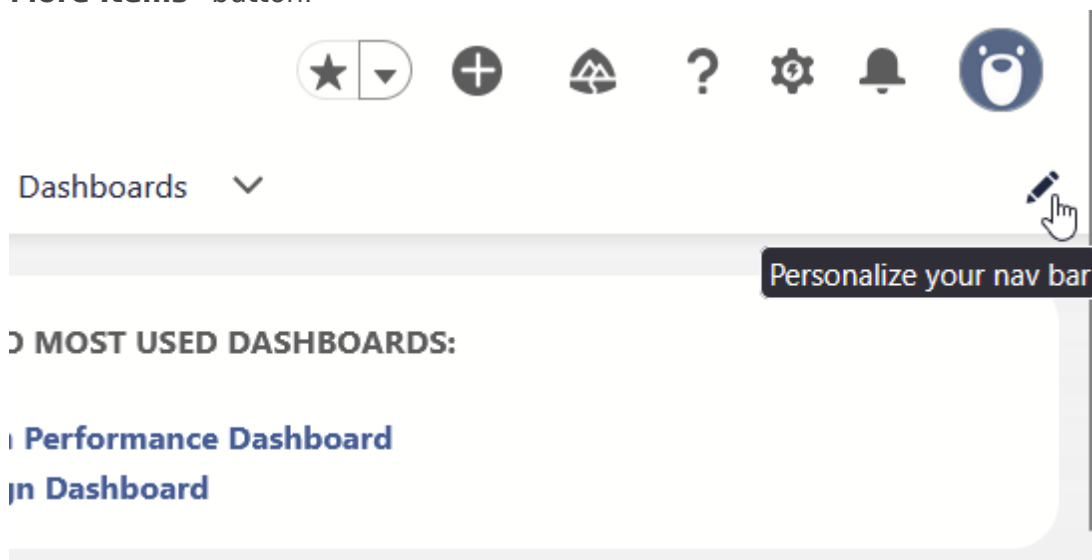
Reports

[View All](#)

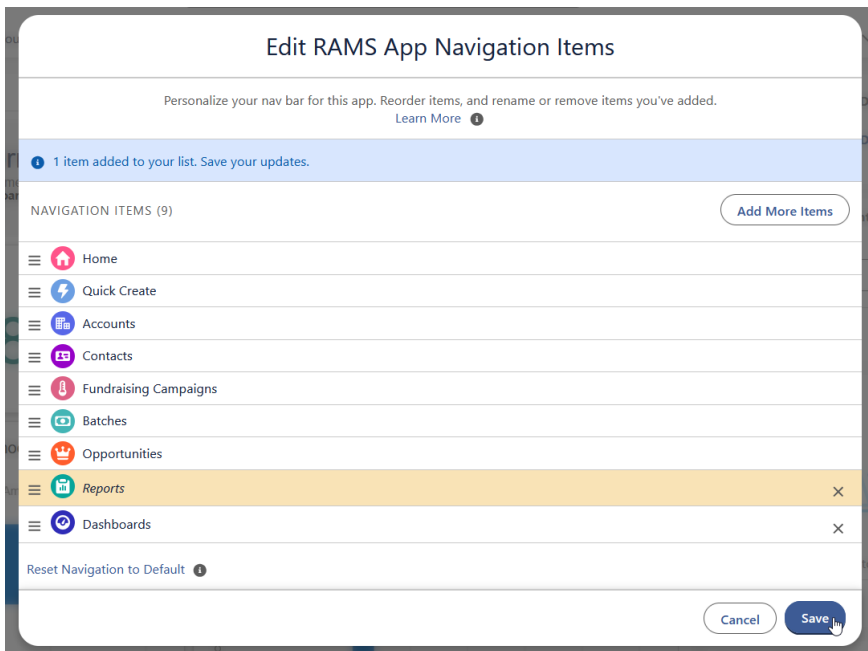
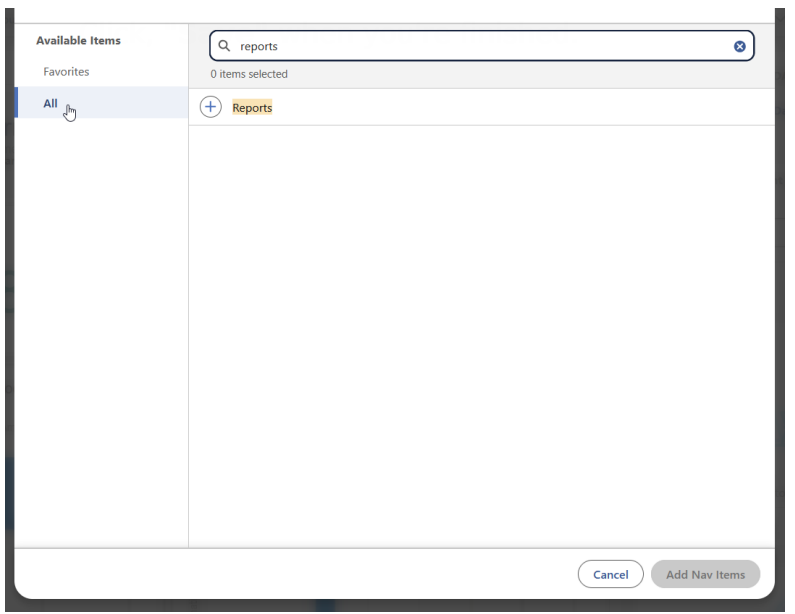
Editing the Nav Bar

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.

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

Revision #6

Created 2026-07-07 14:52:10 UTC by Wilhelmina Aumann

Updated 2026-07-07 16:02:04 UTC by Wilhelmina Aumann