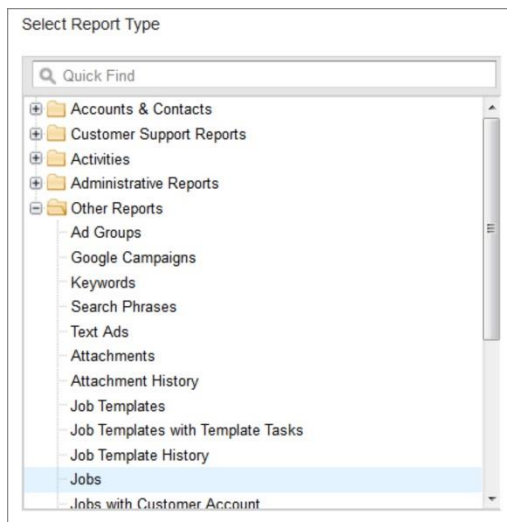


Best Practices: Build a Custom Report

This tutorial will demonstrate how to build a custom report using the Salesforce® report builder. Building a custom report is as easy as dragging and dropping fields – this tutorial will outline the tools available to build a custom report.

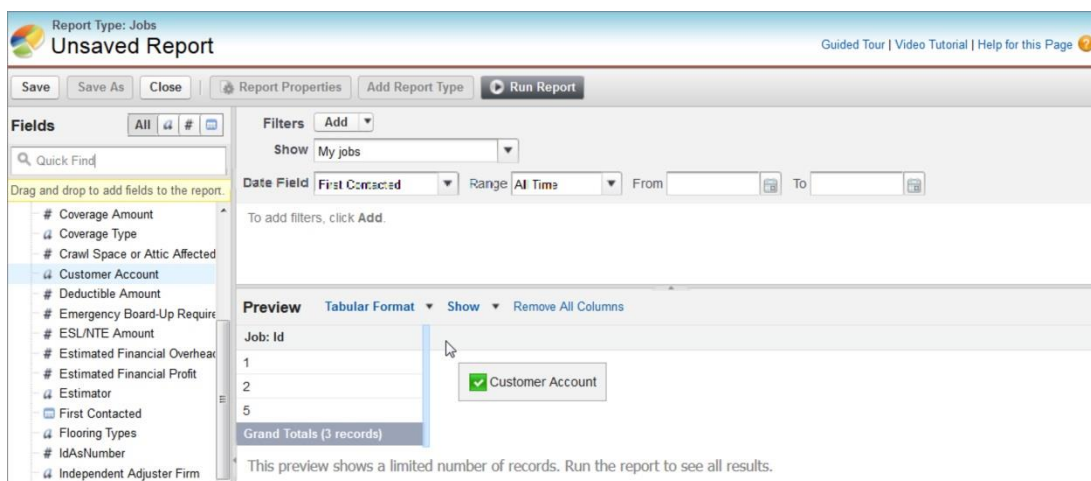


1. Log in to JobCheck web desktop as the admin user.
2. Click on *Reports* from the primary navigation bar.
3. Click “*New Report*” and select a report type.



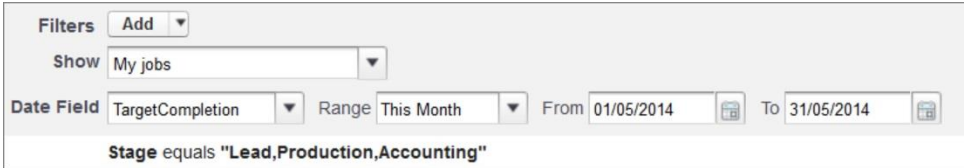
Custom reports are based on report types; select the report type that best reflects what you wish to build a report for (i.e. the *Jobs* report type will make jobs the base reporting criteria).

4. Click “*Create*”.
5. Using the *Fields* menu, drag and drop the fields you would like to add to your custom report.

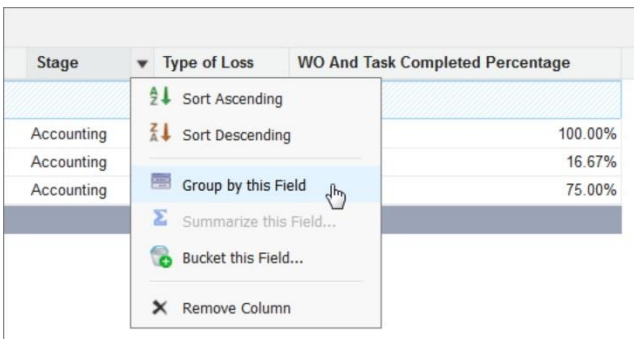


Optional Report Add-Ons

6. Add a filter to the report. Click “Add” and specify filter criteria.

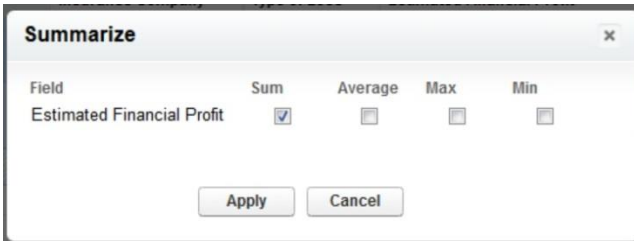


7. Create groupings within your report. Click the dropdown arrow next to any field and choose “Group by this Field”.



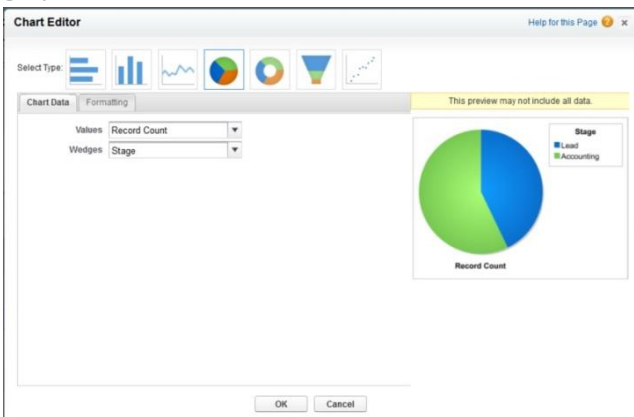
Stage	Type of Loss	WO And Task Completed Percentage
	Sort Ascending	
Accounting	Sort Descending	100.00%
Accounting	Group by this Field	16.67%
Accounting	Summarize this Field...	75.00%
	Bucket this Field...	
	Remove Column	

8. Summarize a field that contains a value. Click the dropdown arrow next to the field and choose “Summarize this Field”. Select how you would like to summarize and click “Apply”.



Field	Sum	Average	Max	Min
Estimated Financial Profit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Add a chart to your report. Click “Add Chart” and select the type of chart as well as the graphical criteria → Click “Ok”.



10. When you have finished creating and customizing your report, click “Save”.

The new report will be available from your custom reports list. Any user in the system can generate this report, but only the Admin user can edit or delete it.

Preview							
Summary Format							
Show							
Add Chart							
Remove All Columns							
Job: Id	Job Name	Customer Account	First Contacted +	Insurance Company	Type of Loss	Estimated Financial Profit	WO And Task Completed Percentage
Status: Open (6 Records)						\$1,451.90	
Stage: Lead (2 Records)						\$0.00	
Drop a field here to create a grouping. Hide							
4	TestImport	*Test Account	- -	-	-	-	-100.00%
1632	Another Import Test	Import Wizard	- -	-	-	-	-100.00%
Stage: Accounting (4 Records)						\$1,451.90	
1	2014-04-WTR	Lively, Joe	06/05/2014 1:49 PM	Wawanesa	Water	\$280.00	100.00%
2	2014-05-WTR	Dunbar, Sam	07/05/2014 8:00 AM	-	Water	\$750.00	16.67%
3	2014-0001-E	John Smith	07/05/2014 11:00 AM	-	Water	\$101.90	50.00%
5	2014-05-WTR	Talulah Doherty	08/05/2014 9:19 AM	-	Water	\$320.00	75.00%
Status: Closed (1 Record)						\$0.00	
Stage: Lead (1 Record)						\$0.00	
0	TestJob	*Test Account	27/04/2014 12:59 PM	-	Fire	-	-100.00%
Grand Totals (7 records)						\$1,451.90	

If you would like to watch a video about getting started with the report builder, [click here](#).