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Admin Tutorial

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.

Home	Contacts	Accounts	Reports	Employees	Admin	+

- 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.

Q Quick Find	
Accounts & Contacts	
E Customer Support Reports	
🗉 🦰 Activities	
Administrative Reports	
🗉 🖂 Other Reports	
Ad Groups	E
Google Campaigns	
Keywords	
- Search Phrases	
- Text Ads	
Attachments	
Attachment History	
Job Templates	
Job Templates with Template Tasks	
Job Template History	
Jobs	
Jobs with Customer Account	-

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.

Consaved Report Type: Jobs		Guided Tour Video Tutorial Help for this Page 🥹
Save Save As Close	Report Properties Add Report Type Run Report	
Fields All a # C	Filters Add Filters Add Filters Add Filters Add Filters Add Filters Add Filters Connected Filters Connected Filters Add Filters Connected Filters Add Filters Add	of to
# Coverage Amount Coverage Type # Crawl Space or Attic Affected Customer Account	To add filters, click Add.	
Poductible Amount Emergency Board-Up Require ESL/NTE Amount ESL/NTE Amount Estimated Financial Overheac Estimated Financial Profit Estimator First Contacted Fioring Types IdasNumber Idaependent Adjuster Firm	Preview Tabular Format Show Remove All Columns Job: Id I 1 Image: Customer Account 5 Image: Customer Account Grand Totals (3 records) Image: Customer Account	S.

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Optional Report Add-Ons

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

Filters	Add 🔻									
Show	My jobs			-						
Date Field	TargetCompletion	•	Range	This Month	•	From	01/05/2014	To 31/	05/2014	8
	Stage equals "Lea	d,Pro	duction	,Accountin	g"					

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 Descendin	g 100.00%
Accounting		16.67%
Accounting	Group by this F	ield (h) 75.00%
	Σ Summarize this	s Field
	🔞 Bucket this Field	d
	× Remove Colum	n

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"*.

Summarize					×
Field Estimated Financial Profit	Sum V	Average	Max	Min	
A	pply	Cancel			

9. Add a chart to your report. Click "Add Chart" and select the type of chart as well as the graphical criteria \rightarrow Click "Ok".

Chart Editor			Help for this Page 😔 1
Select Type:		9 7 2	This preview may not include all data.
Values Wedges	Record Count	×	Record Count
		OK Cancel]

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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.

Job: Id	Job Name	Customer Account	First Contacted +	Insurance Company	Type of Loss	Estimated Financial Profit	WO And Task Completed Percentage
• Sta	tus: Open (6 Records)					\$1,451.9	0
•	Stage: Lead (2 Records)					\$0.0	0
	Drop a field here to cre	eate a grouping. Hide	•				
4	TestImport	*Test Account	-		-		100.009
1632	Another Import Test	Import Wizard		-	÷		100.009
	Stage: Accounting (4 Reco	ords)				\$1,451.9	0
1	2014-04-WTR	Lively, Joe	06/05/2014 1:49 PM	Wawanesa	Water	\$280.0	0 100.009
2	2014-05-WTR	Dunbar, Sam	07/05/2014 8:00 AM	-	Water	\$750.0	0 16.679
3	2014-0001-E	John Smith	07/05/2014 11:00 AM	-	Water	\$101.9	0 50.009
5	2014-05-WTR	Talulah Doherty	08/05/2014 9:19 AM	-	Water	\$320.0	0 75.009
Sta	tus: Closed (1 Record)					\$0.0	0
	Stage: Lead (1 Record)					\$0.0	0
D	TestJob	*Test Account	27/04/2014 12:59 PM	-	Fire		100.009

If you would like to watch a video about getting started with the report builder, click here.