
Salesforce Training

Running Mail Group Reports by Year

Contents

- 1 Overview3
- 2 Running a Mail Group Members Report by Year3
- 3 Save a Report5

1 Overview

The following steps will help assist in running a Mail Group with Mail Group Members report and sorting those reports by year. For more information on running reports and exporting report data, please refer to the *Salesforce Reports* documentation in the Salesforce Training site.

2 Running a Mail Group Members Report by Year

Complete these steps in order to run a Mail Group with Mail Group Members report filtered by year.

1. Click the **Reports** tab in Salesforce.
2. Click the **New Report** button from the top of the page.
3. Select the plus sign next to the **Mail Groups** folder, and then click the **Mail Groups with Mail Group Members** option.
4. Click the **Create** button.
5. Start the process of creating a Mail Group with Mail Group Members report.

Note: You can also start this process by using a Mail Group with Mail Group Members report that you already have saved.

6. For example, if you are starting a new Mail Group report, select **All mail groups** from the **Show** field.
7. Click the **Add** button next to the **Filters** field, and then select **Account Name** for the first drop-down.
8. **Equals** should be selected for the second drop-down, and then in the third drop-down you should enter the name of your county (Ex. “*Carroll County*”).
9. Add another filter by clicking the **Add** button next to the **Filters** field.
10. Select **Mail Group Name** for the first drop-down, and then leave **Equals** in the second drop-down.

11. Enter the name of the Mail Group you want to filter (Ex. “*EH Kokomo District*”).
12. After rearranging the report to appear how you want, drag and drop the **Year** field from the **Fields** section on the left hand side of the page to anywhere in the report.

The years are then listed for each Mail Group Member.

The screenshot shows the Salesforce report builder interface. At the top, there are buttons for 'Save', 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. Below these are two main sections: 'Fields' and 'Filters'.

The 'Fields' section on the left contains a 'Quick Find' search bar and a list of fields. A red circle highlights the 'Year' field under the 'Member: Custom Info' folder. A red arrow points from this field to the 'Year' column in the preview table.

The 'Filters' section on the right shows a 'Show' dropdown set to 'All mail groups'. Below it, the filter criteria are displayed: 'Account Name equals "Carroll County" AND Mail Group Name equals "EH Kokomo District"'. There is an 'Add' button next to the filter criteria.

At the bottom, the 'Preview' section shows a table with the following columns: 'Mail Group Name', 'First Name', 'Last Name', and 'Year'. The table contains 14 rows of data for the 'EH Kokomo District' mail group, with years ranging from 2009 to 2014. A red arrow points to the 'Year' column header.

Mail Group Name	First Name	Last Name	Year
EH KOKOMO DISTRICT	ELLEN	RING	2014
EH Kokomo District	Alice	Lambert	2014
EH Kokomo District	Megihann	Leiningner	2014
EH Kokomo District	Jane	Long	2009
EH Kokomo District	Mindy	Mays	2014
EH Kokomo District	Sandra	Mc Cain	2009
EH Kokomo District	Carolyn	Mosson	2011
EH Kokomo District	Mary	Nettles	2012
EH Kokomo District	Jeanna	Paschen	2014
EH Kokomo District	Lindsey	Pedigo	2014
EH Kokomo District	JONI	RICH	2014
EH Kokomo District	Jeanne	Shockley	2009
EH Kokomo District	Phyllis	Shuck	2009

13. Add another filter by clicking the **Add** button next to the **Filters** field.
14. Select **Year** for the first drop-down, and select **Equals** for the second drop-down.
15. Enter in the year that you want to filter the group by in the third column (Ex. “2014”).

Filters

Show

Account Name equals "Carroll County"

AND Mail Group Name equals "EH Kokomo District"

AND Year equals

Preview

Mail Group Name	First Name	Last Name	Year
EH Kokomo District	Bonnie	Burns	2014
EH Kokomo District	Esmeralda	Cruz	2014
EH Kokomo District	Kim	Frazier	2014
EH Kokomo District	Jane	Homer	2014
EH Kokomo District	ELLEN	KING	2014

3 Save a Report

Using the last example, if you create a report that you would like to reuse with the same criteria, then you can save that report so that you can simply run it the next time you need updated results. This will save you time from having to create the criteria and filters for the report.

1. After running the report, click the **Save As** button.
2. Enter a name for your report in the **Report Name** field, and then click **Save**.

Save Report

Report Name

Report Description

Report Unique Name

Namespace Prefix

Report Folder

Click

You will then see your saved report when you go to the main *Reports* screen. The saved report should appear in the center of the screen, but it can also be found in the **My Personal Custom Reports** folder.