
Salesforce Training

Reports

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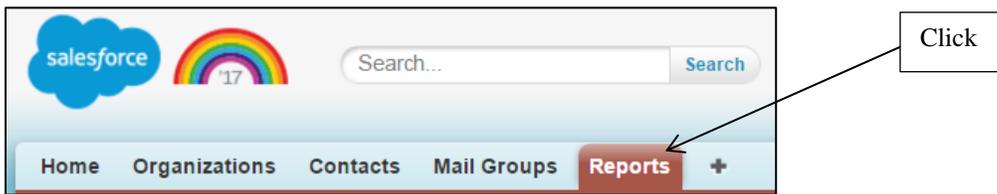
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1 Overview

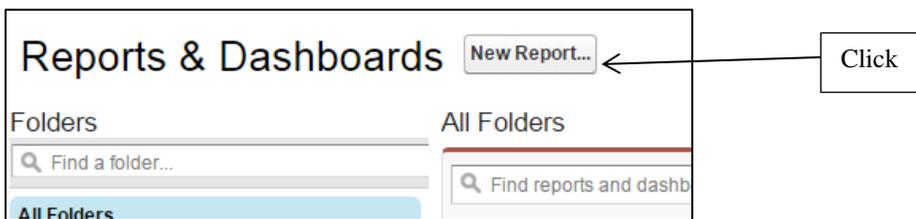
Salesforce has a very robust and effective reporting feature that allows users to easily filter and sort various fields from their Contacts and Mail Groups lists. This document gives an example for running a specific report as well as how to prep a report that can be used for printing mailing labels.

2 Running a New Report

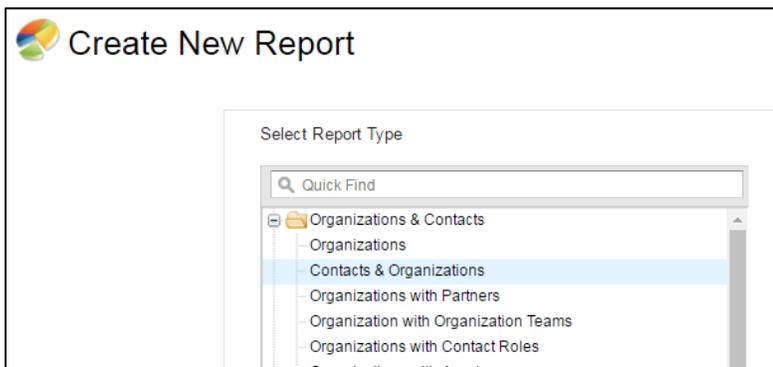
1. Log in to your Salesforce account, and click the **Reports** tab from the top menu.



2. Click on the **New Report** button from the top of the page.



3. From the Create New Report screen you can choose from various types of reports that can be started. For example, if you want a report that shows contacts that have email addresses, you will select **Organizations & Contacts** and then select **Contacts & Organizations**. From there you will filter the results for the view you want.



4. Click the **Create** button from the lower right side of the page after selecting your report type.
5. Following the previous example, you will first select **All Organizations** from the **Show** drop-down menu.
6. Select **All Time** from the **Range** drop-down.
7. Filter the results by your county only, by clicking the **Add** button next to the **Filters** field.
8. For the first filter drop-down, scroll down to *Organization Name*, and select it.
9. Leave the middle field as *equals*, and then enter your county name followed by “County” (ex. “Adams County”)

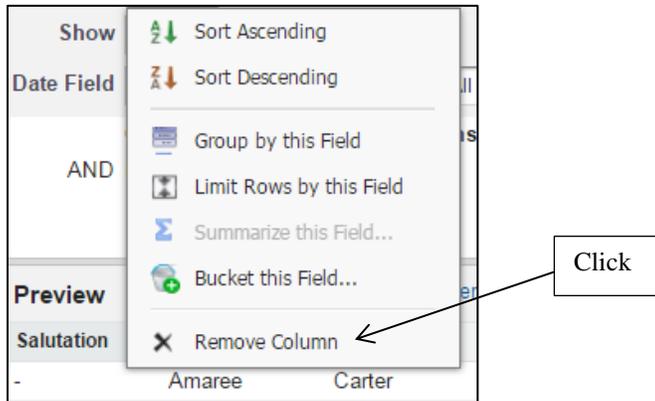
Your filter should look like the following image:

The screenshot shows a filter configuration window. At the top, there is a 'Filters' section with an 'Add' button. Below it, the 'Show' dropdown is set to 'All organizations'. The 'Date Field' is set to 'Created Date' and the 'Range' is set to 'All Time'. There are 'From' and 'To' date pickers. A new filter is being added, with 'Organization Name' selected in the first dropdown, 'equals' in the second dropdown, and 'Adams County' in the text field. 'OK' and 'Cancel' buttons are at the bottom right.

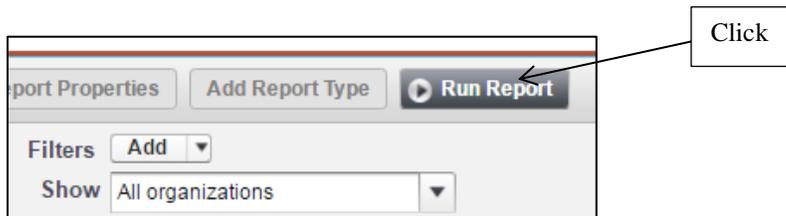
10. Click **OK** to add your filter.
11. To continue with this example, you will need to add another filter. Click **Add** next to the **Filter** field again.
12. Select *Email* for the first filter drop-down, and then select *not equal to* from the second drop-down.
13. Leave the third field blank. The new filter should look like the following image:

The screenshot shows the same filter configuration window as before, but with a second filter added. The first filter is 'Organization Name equals Adams County'. Below it, a new filter is added with 'AND' logic, 'Email' selected in the first dropdown, 'not equal to' in the second dropdown, and an empty text field. 'OK' and 'Cancel' buttons are at the bottom right.

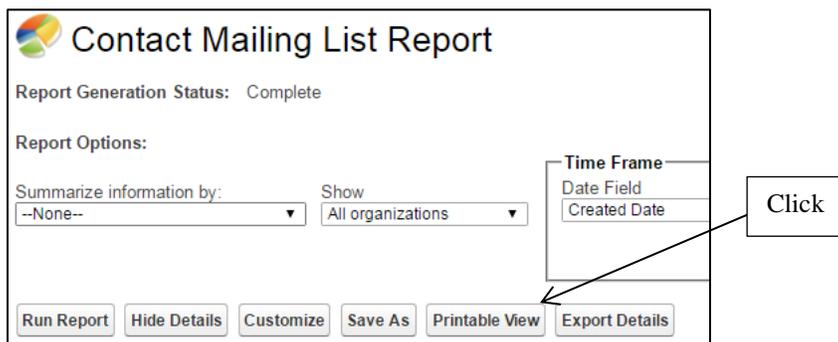
14. Click the **OK** button to add the second filter. Now if a contact doesn't have an email then that contact will not be shown.
15. You can now finalize your report by adding and deleting the necessary columns. For example, we can remove the first column, *Salutation*, by hovering over the column and selecting the arrow next to it.
16. Click **Remove Column** to fully remove it from your report.



17. You can also add any new columns that are not already in your report by selecting the field from the left **Fields** area and dragging and dropping it to where you want it to be in your report.
18. Click **Run Report** when you have it organized how you want.



19. You can then export the report as an Excel file by clicking the **Printable View** button.

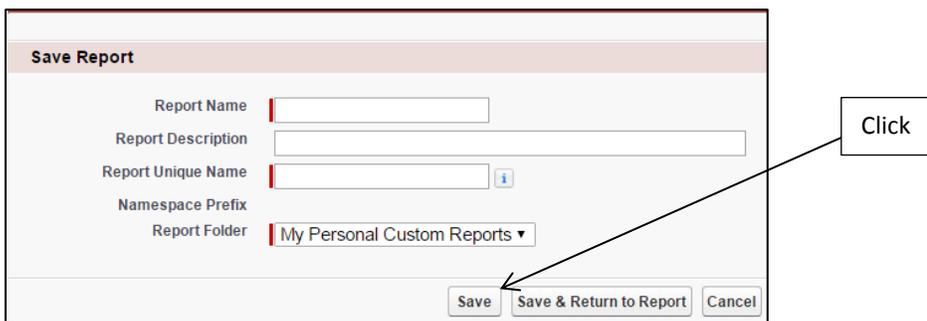


The exported report will then download as an Excel file, but you can save it again as a .csv file if necessary.

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**.

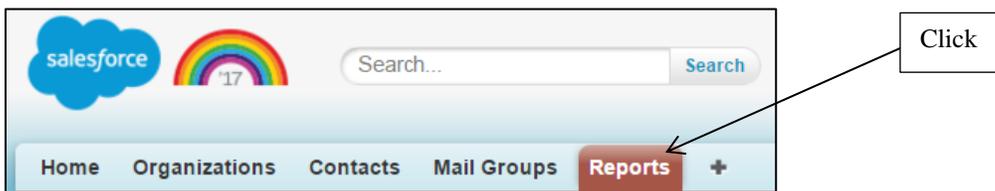


You will then see your saved report when you go to the main *Reports* screen. The saved report should appear in the center of the screen, but it can also be found in the **My Personal Custom Reports** folder.

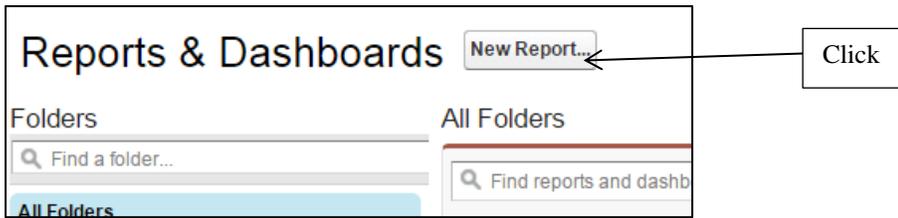
4 Export Mail Groups for Printing Labels

The following steps include running a report for a specific mailing list so that labels for the group can be printed in the Microsoft Word application.

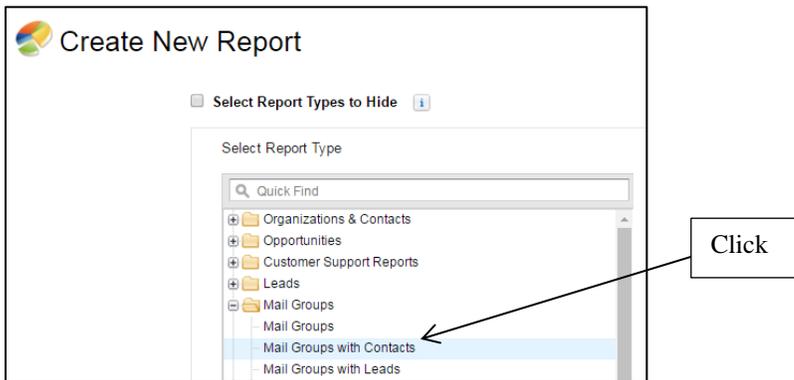
1. Log in to your Salesforce account, and click the **Reports** tab from the top menu.



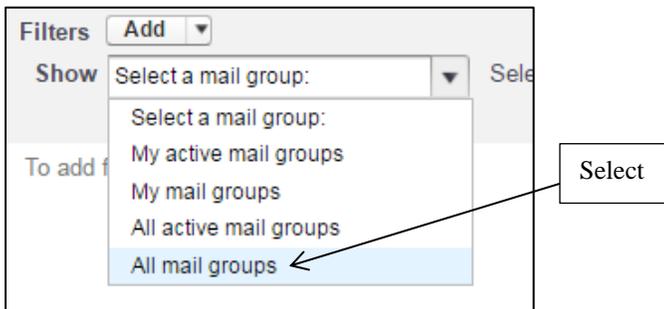
2. Click on the **New Report** button from the top of the page.



3. Click on **Mail Groups**, and then click **Mail Groups with Contacts**.



4. Click the **Create** button from the lower right side of the page after selecting your report type.
5. Select **All mail groups** from the **Show** drop-down menu.



6. Click the **Add** button next to the **Filters** field.
7. Select *Account Name* for the first drop-down, and make sure that next drop-down is *Equals*.

- Enter your county name in the next text box followed by “County,” like in the example below.

The screenshot shows a 'Filters' dialog box with the following elements:

- A 'Filters' section with an 'Add' button.
- A 'Show' dropdown menu set to 'All mail groups'.
- A filter entry: 'Account Name' (dropdown), 'equals' (operator dropdown), and 'Adams County' (text input).
- 'OK' and 'Cancel' buttons.

- Click **OK**.
- Add another filter by clicking **Add** again.
- Select *Mail Group Name* for the first drop-down, and select *Equals* for the next drop-down if it is not already selected.
- Enter the name of the mail group that you want to print labels for. In the example below, *Dairy Committee* was used as the mail group to filter by.

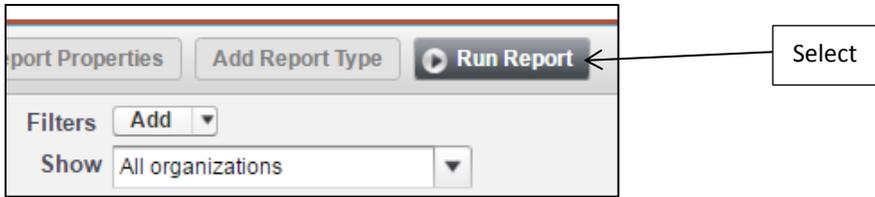
The screenshot shows the 'Filters' dialog box with two filters:

- Filter 1: 'Account Name equals "Adams County"'
- Filter 2: 'AND Mail Group Name equals Dairy Committee'
- 'OK' and 'Cancel' buttons.

- Drag any fields from the **Field** column on the left of the page to your report. For example, you will at least want to have **Mailing Street, Mailing City, Mailing State/Province, and Mailing Zip/Postal Code**.

Mail Group Name	First Name	Last Name ↑	Mailing Street	Mailing City
Dairy Committee	Ian	Bauman	795 LEHMAN ST	Berne
Dairy Committee	Stan	Becher	1352 W 350 S	Berne
Dairy Committee	Keith	Beer	2636 S 200 W	Berne
Dairy Committee	Dean	Beer	4194 E 800 S	Berne
Dairy Committee	Brent	Caffee	5909 N 450 W	Decatur
Dairy Committee	Tony	Fuentes	3400 W Devils Den " d	-
Dairy Committee	Eric	Koenemann	3226 Eastbrook Dr	Ft Wayne

- Click **Run Report** from the top of the page once your report is ready.



15. You can then save your report so it can be ran again by following the steps from [Section 3: Save a Report](#) of this document.

16. Click the **Printable View** button to export your report as an Excel file.

You can then use that report to print your labels after opening Word. Follow the steps provided by Microsoft that guide you on how create and print labels using a mail merge:

<https://support.office.com/en-us/article/Create-and-print-labels-using-mail-merge-276a2cd1-74d2-43d0-ab5a-b90460358ad5>