



improve it 360

an EverCommerce Solution

Report Formulas

& Filtering

Agenda

Report Formulas vs Formula Fields

When it is appropriate to use BOTH a Formula Field and a Report Formula

Understanding Report Types – “with” vs “with or without”

Why would a Joined Report be different from a Summary Report?

Using Cross Filters vs Field Filters – filtering on the entire object or a field?

Report Types – Creating New or Editing Existing



Formulas Exercise

What percentage of our completed Projects are Paid in Full?

Create Two Formula fields:

1. On the Sale object
 - If the Balance Due is less or equal to \$0, give a 1 else give a 0
 - IF (i360__Balance_Due__c <= 0,1,0)
2. On the Project object
 - Copy the Number value from the field on the Sale object
 - This field allows us to Sum the Projects which were Paid in Full within our Report

Create one Report Formula

- Divide the Paid in Full Sum by the Row Count for Completed Projects (be sure to Filter out any incomplete Projects from the Report)

More on creating [Formula Fields](#) directly from SF!

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Adv...

Example: Fahrenheit = 1.8 * Celsius__c + 32 [More Examples...](#)

Simple Formula | **Advanced Formula**

Insert Field

Paid in Full (Number) =
IF (i360__Balance_Due__c <= 0,1,0)

Column Name: PIF %

Description:

Format: Percent | Decimal Places: 2

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels
 Grand summary only
 Grouping 1: Project Manager

Formula | **Functions** | **Tips**

Summary Fields | Operators | Validate

i360__Project__c.Paid_in_Full__c:SUM / RowCount

ABS(number)
Returns the absolute value of a number, a number without its sign

Why doesn't my Joined Report match a Summary report?

(...psst, it is *always* 1 of 3 Reasons!)

1

Report Type is different

Check the **Primary Object** of the Report Type & **with vs with or without** relationships of the records

Always click **Customize button** to see Report Type

Report Type: Lead Source Summaries with Appointment Summaries and Source
Source Cost by Type by Source

Save Save As Close Report Properties Add Report Type Run Report

Fields

Report Type: Sources with Lead Sources with w/o Appts, Sales
Source Cost Performance

Save Save As Close Report Properties Add Report Type Run Report

Filters

Sources with Lead Sources with w block 1 Add
Show All sources
Date Field Taken On Range Previous CY From 1/1/2022 To 12/31/2022
Source Name not equal to "Existing Database"

Sources with Source Costs block 2 Add
Show All sources
Date Field Paid On Range Previous CY From 1/1/2022 To 12/31/2022
Source: Source Name not equal to "Existing Database"

Preview Joined Format Show

Lead Sources	Set	Canceled	Issue	Demo	Sold	Sold Price	Net	Net Amt	AVG Net Amount
2	0	0	0	0	0	\$0.00	0	\$0.00	\$0.00

SOURCES WITH LEAD SOURCES WITH W/O APPTS, SALES
Sources with Lead Sources with w block 1

SOURCES WITH SOURCE COSTS
Sources with Source Costs block 2

Amount	Cost per Lead	Cost

COMPARE REPORT TYPE

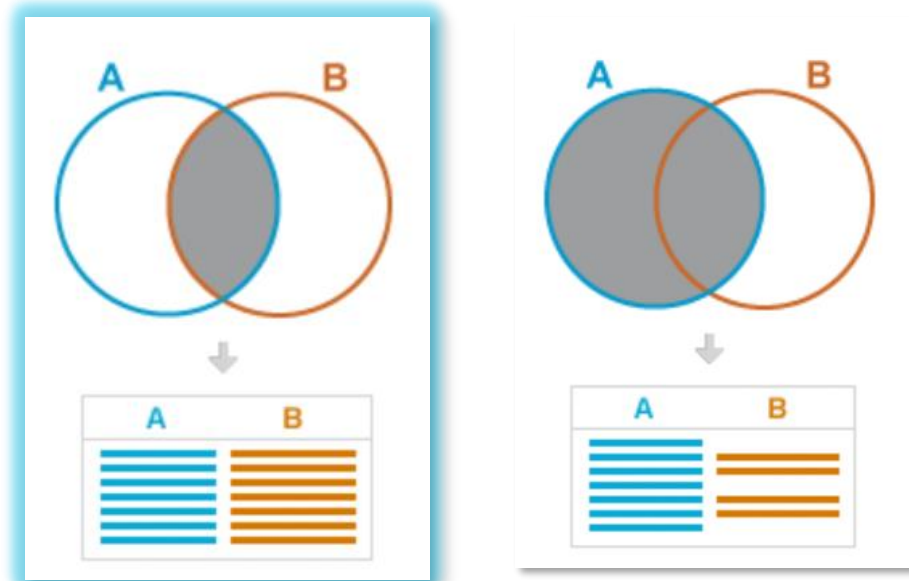
Why doesn't my Joined Report match a Summary report?

1

If the secondary Object has a WITH relationship, you're Good!

Report Type

Check the **with vs with or without** relationships of the records



Check out our other info on [Understanding Report Types](#)

Why doesn't my Joined Report match a Summary report?

2

Filters are different

Check the **Filters** on both Reports. Be sure all blocks of the Joined Report have the same Filters as the Summary report

The top screenshot shows a report titled "Source Cost Performance" with the following filters:

- Block 1: Sources with Lead Sources with w block 1. Filter: Show All sources. Date Field: Taken On. Range: Previous CY. From: 1/1/2022. To: 12/31/2022. Filter text: Source Name not equal to "Existing Database".
- Block 2: Sources with Source Costs block 2. Filter: Show All sources. Date Field: Paid On. Range: Previous CY. From: 1/1/2022. To: 12/31/2022. Filter text: Source: Source Name not equal to "Existing Database".

The bottom screenshot shows a report titled "Conversion Leads to Booked Appts" with the following filter:

- Filter: Taken On. Range: Previous CY. From: 1/1/2022. To: 12/31/2022. Filter text: To add filters, click Add.

The bottom screenshot also shows a preview table with the following data:

Type	Taken	Set	Canceled	Leads to Booked	
Type: (5 Records)		5	0	0	0.0%
Drop a field here to create a grouping. Hide					
Type: New (12 Records)		12	12	0	100.0%
Grand Totals (17 records)		17	12	0	70.6%

COMPARE FIELD AND CROSS FILTERS

Why doesn't my Joined Report match a Summary report?

3

Date Range* is different

If the Report Type is compatible, and the Filters are the same, check your Date Field and Date Range on both Reports.

*Joined Reports have more than ONE Date Range

The screenshot displays two report configurations in a software interface. The top report, titled "Source Cost Performance", has a filter for "Date Field" set to "Taken On" and a "Date Range" of "Previous CY" from "1/1/2022" to "12/31/2022". The bottom report, titled "Lead Source Appointment Conversion YTD", has a filter for "Date Field" set to "Created Date" and the same "Date Range". A red arrow points to the "Created Date" dropdown in the bottom report's filter. Both reports show a warning message: "Source: Source Name not equal to 'Existing Database'".

COMPARE DATE FIELD & DATE RANGE

Filtering your Reports

- **Cross Filter:** Filters on the Object/Record Type (check your Report Type first, be sure you know the object relationship of the Report)
- **Field Filter:** Filters on Data stored on each Record
- **“Without” Cross Filter:** Used when you want to find records that have no related records. You must use a “with or without” Report Type to use the “without” Cross Filter.
- **Use “with” Report Type-** You cannot create a “with” Cross Filter from a “with or without” Report Type. Instead, create a “with” Report Type to use.

Review this [Help Article](#) to learn more about the Out of the Box Reports from improveit 360!

Creating or Editing Report Types

When adding custom fields, if fields are not automatically added to your Report Type (or the Report Type is Managed) you may need to...



[Create Custom Report Types to include your Custom Fields](#)

OR



[Edit Existing Report Types to add new Custom Fields](#)

Check out our other info on [Understanding Report Types](#)

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

