



improve it 360
an EverCommerce Solution

Intro to Reports, Report Types & Filtering

Agenda

Which Reports come Out-of-the-Box?

Locating Report Type and which Objects are in a Report Query

Understanding the “with” versus “with or without” Object Relationship

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



BONUS TOPIC: Report Types – Creating New or Editing Existing

What Reports should we be looking at?

1. Lead Source Performance (conversion rate)
2. Appointment Performance by Sales Rep (close %)
3. Sales by Status (give all Sales a Final On date)
4. Receipts & Adjustments MTD (AR Report)
5. Active Projects (expand to see Activities)

Here are some of our customer's other favorites:

- All Prospects with Email Addresses (an email list)
- Prospects with Wrong or Invalid Phone number(s)
- Campaign Results by Rep (how many calls were made) – requires use of the Call Queue
- Source Cost Performance (cost per Lead, cost per Appt, cost per Sale, ROI) – requires inputting Source Costs
- Appointment Performance Year over Year
- All Un-Resulted Appointments (need a Result)
- Quotes by Status
- Sales by Product Category
- Sales by Month by Rep (what % did each Rep sell)
- Collections by Month YTD (total funds received)
- All Sales with Outstanding Balance
- Projects Completed not yet Paid in Full
- Sales by Status
- Projects Aging (Active Projects older than 30 Days)
- Projects with Project Costs

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

How can I tell what a Report is Querying?

Report Type is the key!

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

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

The screenshot shows a Salesforce report interface. At the top, the report title is 'Appointment Performance by Rep - YTD' and the report type is 'Appointments with or without Sales'. The report is filtered by 'Appointment Date' from 1/1/2022 to 12/31/2023. The report is displayed in a table format with columns for 'Set', 'Canceled', 'Issue', 'Demo', 'Sold', 'Sold Price', and 'Demo %'. The table shows data for various sales representatives, including Bertram Sales Rep, Billy Sales Rep, Bobby Sales Rep, Cecil Service, Olivia Admin, and Sammy Sales. The 'Grand Totals' row shows 20 records, with 2 canceled, 14 issues, 14 sold, and a total sold price of \$90,823.50.

	Set	Canceled	Issue	Demo	Sold	Sold Price	Demo %
Sales Rep 1: Staff Name: - (2 Records)		2	0	2	2	2	\$1,027.50 100.00%
Drop a field here to create a grouping. Hide							
Sales Rep 1: Staff Name: Bertram Sales Rep (2 Records)		2	0	2	2	1	\$2,650.00 100.00%
Sales Rep 1: Staff Name: Billy Sales Rep (2 Records)		2	0	2	2	2	\$55,000.00 100.00%
Sales Rep 1: Staff Name: Bobby Sales Rep (1 Record)		1	0	1	1	1	\$5,238.00 100.00%
Sales Rep 1: Staff Name: Cecil Service (1 Record)		1	0	1	1	1	\$4,000.00 100.00%
Sales Rep 1: Staff Name: Olivia Admin (3 Records)		3	0	2	2	2	\$2,908.00 100.00%
Sales Rep 1: Staff Name: Sammy Sales (9 Records)		9	2	4	4	4	\$20,000.00 100.00%
Grand Totals (20 records)		20	2	14	14	13	\$90,823.50 100.00%

Does a Joined Report have more than one Report Type? – **YES!**

Does that affect the Date Filters?! – **YES!**

For more – check out our other Reporting webinars in the [Average Joe Admin Series](#)

IDENTIFY REPORT TYPE

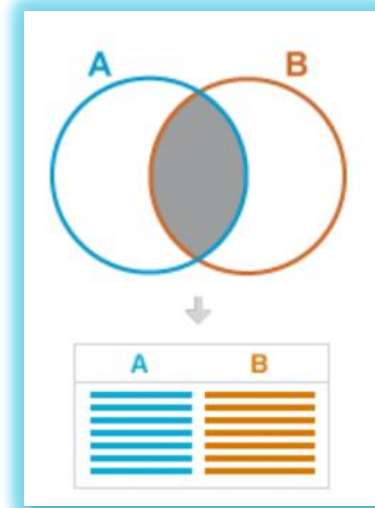
How are these Report Types different?

If the secondary Object has a WITH relationship, you're Good to add Filters for the secondary object!

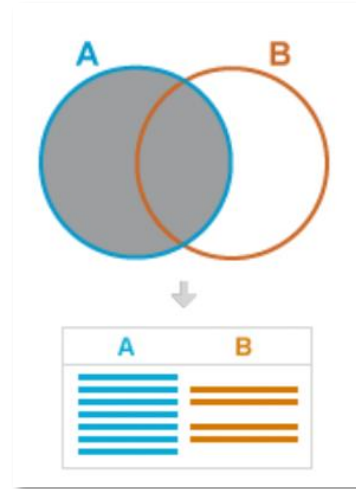
A = Appointments
B = Sales

Appointments WITH Sales you CAN Filter on data from the Sale records (like Sold On date)

Appointments WITH Sales



Appointments WITH OR WITHOUT Sales



Appointments WITH OR WITHOUT Sales you CANNOT Filter on any data from the Sale records, as not every Appointment in the Report has a Sale

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

Note: Close % Reports must use a 'with or without' Report Type

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

