



## Advanced Admin – Prerequisite

# Introduction to Building Reports and Dashboards

“CAN EACH OF OUR SALES REPS BE SENT A DASHBOARD WITH JUST THEIR METRICS? HOW MANY APPOINTMENTS THEY RAN, WHICH ONES SOLD, WHICH PROJECTS THEY HAVE COMING UP, AND THEIR CLOSE %?”

-Bobby Miles, Basement Doctor of Cincinnati



## What are Reports & Dashboards?

Many times when speaking about improveit 360, you will hear ‘Reports & Dashboards’ mentioned together in the same sentence, even though they are two different things.

- **Reports** are an accumulation of data (often times in a ‘summarized’ format) that allows you to view business trends and perform powerful calculations on data in order to make business decisions.
- **Dashboards** are a tool used to *visualize* report data, such as a pie chart, funnel, bar chart, or line graph. Every dashboard is built upon an underlying report. Dashboards reduce the need for in depth analysis of data and provide a high level summary of ‘what’s going on’ that can be deciphered at a glance.

One of the many benefits of using salesforce.com as the platform of improveit 360 is the power and usability of the report and dashboard editors. As you will notice in today’s training, reports can be built by dragging and dropping fields into a report designer. This allows your business to create new reports quickly and easily, providing you with quicker access to key information that you need in order to run your business most effectively.

## PART 1: Introduction to Reports

Reports in improveit 360 are easy to access, run, and manipulate. They can provide powerful information that will help your business make better decisions. In this portion of the chapter, we will cover both pre-made (also called ‘out-of-the-box’) reports that come with your improveit 360 system, as well as how you can create your own custom reports.

### Reports Tab

The tab labeled ‘Reports’ will be where you go in order to create, search for, or run any reports in your improveit 360 system. Note that you can also access dashboards from the reports tab. There is also a separate dashboard tab that we will talk about in a later section.

### Demonstration: Accessing the Reports Tab

**Step 1:** *Click on the Reports Tab (note: this Tab may only be accessible from the (+) or the All Tabs page)*

**Step 2:** *Select a Report Folder*

**Step 3:** *Select a Dashboard Folder*

**Step 4:** *Select All Folders and use Search bar to locate Reports with specific name*

The reports tab is segmented into two sections – a list of all report and dashboard folders on the left, as well as a list of each individual report or dashboard contained in the selected folder in the center of the screen.

### Folders

All of the report and dashboard folders in your system are displayed in the left panel of the reports tab labeled ‘Folders’. Folders allow you to group reports and dashboards – for example, you could create separate folders for individual teams in your organization, so that they can find all of their reports in a single location. A few key actions to note:

- You can search for a folder by name by typing into the ‘Find a folder’ search field at the top of the panel.
- You can create a new folder by clicking the folder icon with the orange star to the right of the search field.
- You can pin a folder to the top of the list by clicking to the right of a folder name and selecting ‘Pin to Top’.
- You can edit the folder name and modify folder permissions by clicking to the right of a folder name and selecting ‘Edit’. Note that this is where you can make changes so that only certain users can access a folder.
- You can delete a folder by clicking to the right of a folder name and selecting ‘Delete’.

### *Reports List*

A list of all reports contained in a specified folder will be displayed when the folder is selected in the left panel. From the listing of reports, you can do the following:

- Search for a report by name by typing in the 'Find reports and dashboards' search field at the top of the section.
- Run a report by clicking on the report name.
- Edit a report by selecting the gray down arrow to the left of the report name and clicking on 'Edit'.
- Delete a report by selecting the gray down arrow to the left of the report name and clicking on 'Delete'.
- Export a report by selecting the gray down arrow to the left of the report name and clicking on 'Export'.

### *Staying Organized*

Oftentimes customers find themselves overwhelmed with the number of reports that get created within the first few months of being on the system. This makes it hard for them to keep track of which reports are actually being used, and which reports can be deleted.

A good rule of thumb is to tell all users to create and save new reports in the 'My Personal Custom Reports' folder. This folder is only accessible to that user who created the report until the report is moved into a different folder that is accessible by other users.

If you need to collaborate with other users on a report, we suggest creating an "In Progress" folder. Once the reports are finalized, they can be moved out of the "In Progress" and into a different folder.

### *Running a Report*

To run a report, all you need to do is find the report and click on the report name. This will open a new page which displays the report. Depending on the size of the report, sometimes the system will take a few moments to fully render the complete report data.

You will also notice that there is a 'Run Report' button once you are on the report view screen. Clicking this button will re-run the report, grabbing any new data that meets the report criteria and displaying it accordingly.

### *Changing the Date Range*

You can easily change the date range of data that is being pulled by a report in improveit 360. This is a useful feature, because it allows you to only have one report that can be quickly adjusted to show you different data for different date ranges. For a lot of our customers, this eliminates the need to create separate reports for WTD, MTD, and YTD metrics.

**Scenario: Let's say we want to view a report of how your company is performing on Appointments, broken down by product interest for the last 90 days. Which products have the best demo and close rates? Which product is your company making the most money on per sale?**

### **Demonstration: Running Report & Changing Date Range**

**Step 1:** *Click on the Reports Tab*

**Step 2:** *Select the folder named 'Appointments'*

**Step 3:** *Search for the report called 'Appointment Performance by Rep – YTD'*

**Step 4:** *Click on the Report name to Run the Report*

**Note:** The Data Range of this Report is "Current CY" which stands for the Current Calendar Year. We want to look at our Appointments only for the Last 90 Days.

**Step 5:** Click on the Range drop down list in the upper right corner.

**Step 6:** Select the 'Last 90 Days' option

**Step 7:** Click the Run Report button

Note that you can also modify the date range of a report to use a custom start and end date that you define. Simply enter the dates that you would like to use in the 'To' and 'From' fields, and run the report.

### *Changing the Summary Level*

**Scenario:** Let's take the 'Appointment Performance by Rep' report and change it such that it is grouped by Product of Interest instead of by Sales Rep.

### **Demonstration: Changing Summary Level of a Report**

**Step 1:** Click on the Report called 'Appointment Performance by Rep – YTD'

**Step 2:** Toward the top of the page, change the 'Summarize information by' field which current has Sales Rep 1: Staff Name, and choose from the picklist: Product Category

**Step 3:** Click Run Report

**Note:** The Report Data is now Grouping the Appointments by the primary Product Category of Interest

**Step 5:** Click Save As

**Step 6:** Give the Report a Name of "Appointment Performance by Product YTD"

**Step 7:** Click the Save & Return to Report button

**Note:** Always use Save As when changing Summary Groupings or Date Ranges to prevent overwriting your previous Report data.

### *Showing Details*

**Scenario:** Let's say we want to view the underlying information in the report. Which specific appointments are making up the statistics that we're viewing?

To see the individual records that are being summarized in a report, click on the 'Show Details' button at the top of the screen. This will expand each section to show each individual record that is being used to calculate the information displayed at the summary level of the report. Simply click 'Hide Details' if you would like to collapse each section to no longer show the individual records.

When building your own reports, the show details feature can be useful as it helps you to ensure the correct records are being pulled by the system, and that you haven't forgotten any important filters.

### *Drilling Down*

**Scenario:** We're viewing our report and we only want to see the statistics for Windows.

### **Demonstration: Using 'Drill Down' on a Report**

**Step 1:** Run the Appointment Performance by Product YTD Report

**Step 2:** In the body of the Report, check the checkbox next to the Product Category Group for 'Windows'

**Step 3:** Scroll down and click the 'Drill Down' button

**Result:** Only the Appointments in which the Product of Interest was Windows will be visible in our Report.

Note that a Filter has automatically been added to the report that says Product Category 'equals' Windows. If you would like to go back to the full report, simply click 'Clear' to remove the Filter.

Using the drill down feature allows you to further filter down the report information that is shown, without actually editing the report.

### Exporting Report Data

Often times you may want to export a report so that you can manipulate data externally, load it into a different program, or simply to have a physical copy to review. There are two ways that you can export a report:

- **Export Details:** The export details button exports each individual report that makes up the report into a .xls or .csv file. Exporting details will not maintain any summary calculations or groupings. It simply extracts the individual records underlying a report. This is ideal if you need to manipulate data using an external tool, or load it elsewhere.
- **Printable View:** The printable view button downloads the report 'as is' into an Excel file, which can be printed as a hard copy. This is ideal if you simply want to print a copy of a report that can be reviewed by other individuals.

## PART 2: Creating Custom Reports

Creating custom reports in improveit 360 is a relatively simple process, depending on the report that you are trying to create. The drag and drop report builder puts the power of building reports and analytics into the hands of business users, rather than relying on the skills of developers.

Keep in mind that if you need help along the way, there are a multitude of resources that you can leverage.

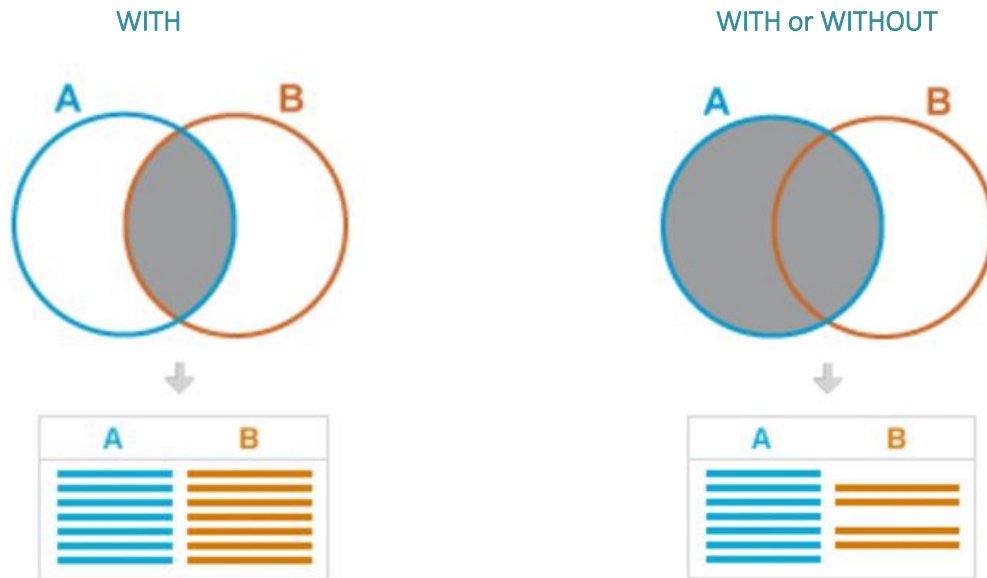
- The improveit 360's Support Team can help you create more complex reports as a paid Advanced Service.
- Visit the 'Help' link from within the improveit 360 application and type 'Report' into the Search bar.
- There is extensive documentation and videos on how to use the salesforce.com report builder and dashboard builder tools. These tools are identical in improveit 360.

In this section, we'll walk through an example of how to build a report using a 'single object' Report Type.

## Report Types

When creating a new report, you must first select a report type. A report type defines where the data for the report should come from. For example, if you want to create a report that contains data from a Prospect record, you would select a report type of 'Prospect'.

Report Types can encompass more than one type of record. It is important to note if your Report Type is using a "with" object relationship or a "with or without" object relationship. Here are venn diagram examples of a "with" Report Type versus a "with or without" Report Type:



For example, since Lead Sources are linked (or related to) Prospect records, you can select a report type of 'Lead Sources **with** Prospect' if you'd like to create a report that analyzes data across both Prospect records and Lead Source records.

For today's exercises, we will be using only single object Report Types.

### Choosing a Report Type

Once a Report is created, you cannot change the Report Type. The Fields available within the Report are dependent on the Report Type. In our Advanced Reporting Training we will teach you how you can Add Fields to unmanaged Report Types.

**Scenario:** Our Marketing Manager would like to see how many new Leads are coming in Week-to-Date, Month-to-Date and Year-to-Date, and which Sources are bringing us those Leads. We will need to create three reports, one for each Date Range.

### Demonstration: Build a Report using the Report Type 'Lead Sources'

**Step 1:** Go to the Reports Tab

**Step 2:** Click the 'New Report' button

**Step 3:** Select the Report Type of 'Lead Sources' and click Create

**Result:** The Report Builder tool is launched.

## Report Editor Layout

Before we jump into creating our new report, let's first walk through some of the basics of the report editor.

### Fields

All of the fields that are available to display in your report are shown along the left side panel. These fields are pulled directly from the report type, so if you do not see a field that you need, you will need to change your report type. You can search for a field by name by typing in the 'Quick Find' field at the top of the fields list.

### Filters and Date Field

The top panel contains parameters that allow you to define which records you want displayed in the Report by using filters and date ranges.

### Preview

The preview panel will display a preview of your report as you make changes and edits. The preview section also allows you to change the format of the report (Tabular, Summary, Matrix, or Joined), and allows you to hide or show the details of the report. When building a new Report, the Format will default to Tabular. In order to Group data, you'll need to change the Format to Summary.

## Demonstration: Build a Report using the Report Type 'Lead Sources' – Continued

**Step 4:** Change the Filters and Data Range at the top of the Report Editor

**Step 5:** Change the 'Show' Filter to show 'All Lead Sources'

**Step 6:** Change the Data Field to 'Taken On' and select a Range of 'Current CY'

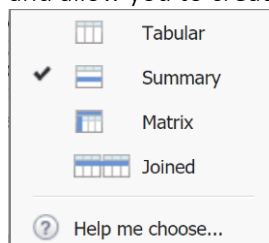
**Step 7:** Next to Filters click 'Add'

**Step 8:** Choose the Field 'Source Name' and select the operator of 'not equal to' and enter 'Existing Database' in the Filter value area.

**Result:** Preview Pane shows sample of records where Taken On date of the Lead Source is during the Current Calendar Year and the Lead was not due to our Existing Database remarketing.

The next thing we will need to do with our report is to create a 'grouping' level. This is where the different formats of reports, like tabular, summary, matrix, and joined come into play. Here's a quick summary of what each of the different report formats do:

- **Tabular:** The simplest form of Report, Tabular reports look like an excel spreadsheet of data – they are simply a list of filtered information. The data can be sorted Ascending or Descending.
- **Summary:** Summary reports group information by row. The records that fall under each row can be hidden by clicking 'hide details' or shown by clicking 'show details'.
- **Matrix:** These reports have a grid like appearance, and allow you to group data by two fields simultaneously. This creates a visual grouping both by row and by column.
- **Joined:** Joined reports are fairly complex, and allow you to create a single report using multiple Report Types.



## Demonstration: Build a Report using the Report Type 'Lead Sources' – Continued

**Step 9:** In the Field 'Quick Find' search for 'Source'

**Step 10:** Double-click on 'Source Name' or drag-and-drop the Source Name field into the Preview pane

**Step 11:** From within the Preview Pane, hover over the Source Name column and click the down Arrow

**Step 12:** Select 'Group by this Field'

**Result:** Preview Pane shows the sample records Grouped by the Source which brought your company the Lead information.

**Step 13:** Click Run Report

**Step 14:** Click 'Save As'

**Step 15:** Save this Report as 'Lead Sources YTD by Source' and Save it in the Report Folder: Lead Sources

*Note: Be sure to Save your Reports in a Folder you will easily remember. You'll need to locate the Report later, when Building the Dashboard.*

### Saving Reports

Once you have created your report and made all of your changes, you can save your report by clicking the 'Save' button. This is accessible from both the report detail screen as well as the edit screen.

When you save a report, all you need to specify is a Report Name, Description, and to specify a folder where you would like the report to be stored. You will notice a report 'Unique Name' field – this will default based on the report name that you choose. In the event that you already have a report with the name you pick, the system will require that the unique name be different.

## Demonstration: Clone and 'Save As' the Lead Sources report for Month-to-Date and Week-to-Date Ranges

**Step 1:** Run 'Lead Sources YTD by Source' Report

**Step 2:** In the Time Frame box, change the Range to 'This Month'

**Step 3:** Click Run Report

**Step 4:** Click 'Save As'

**Step 5:** Save this Report as 'Lead Sources MTD by Source' and Save it in the Report Folder: Lead Sources

**Step 6:** Click 'Save & Return to Report' button

**Step 7:** In the Time Frame box, change the Range to 'This Week'

**Step 8:** Click Run Report

**Step 9:** Click 'Save As'

**Step 10:** Save this Report as 'Lead Sources WTD by Source' and Save it in the Report Folder: Lead Sources

**Step 11:** Click 'Save' button

**Result:** We now have three Reports Saved in the Lead Sources Report Folder: Lead Sources taken Week-to-date, Month-to-date and Year-to-date.

**Next Scenario:** Our Sales Manager would like to see how many Appointments are being Set during the time frames of Week-to-Date, Month-to-Date and Year-to-Date, and which marketing Sources brought us those Leads. We will need to create three reports, one for each Date Range. For these Reports, our Manager wants to Filter out any Appointments that were Resulted as Canceled.



## Demonstration: Build a Report using the Report Type 'Appointments'

**Step 1:** Go to the Reports Tab

**Step 2:** Click the 'New Report' button

**Step 3:** Select the Report Type of 'Appointments' and click Create

**Result:** The Report Builder tool is launched.

**Step 4:** Change the Filters and Data Range at the top of the Report Editor

**Step 5:** Change the 'Show' Filter to show 'All Appointments'

**Step 6:** Change the Data Field to 'Appointment Date' and select a Range of 'Current CY'

**Step 7:** Next to Filters click 'Add'

**Step 8:** Choose the Field 'Result' and select the operator of 'not equal to' and use the magnifying glass icon to select 'Canceled' as the Filter value.

**Result:** Preview Pane shows a sample of records in which the Appointment Date was during the Current Calendar Year AND the Appointment was not Resulted as Canceled.

**Step 9:** In the Field 'Quick Find' search for 'Source'

**Step 10:** Double-click on 'Source Name' or drag-and-drop the Source Name field into the Preview pane

**Step 11:** From within the Preview Pane, hover over the Source Name column and click the down Arrow

**Step 12:** Select 'Group by this Field'

**Result:** Preview Pane shows the sample Appointment records Grouped by the Source which brought your company the Lead information.

**Step 13:** Click Run Report

**Step 14:** Click 'Save As'

**Step 15:** Save this Report as 'Appointments YTD by Source' and Save it in the Report Folder: Appointments

*Note:* Be sure to Save your Reports in a Folder you will easily remember. You'll need to locate the Report later, when Building the Dashboard.

## Demonstration: Clone and 'Save As' the Appointments report for Month-to-Date and Week-to-Date Ranges

**Step 1:** Run 'Appointments YTD by Source' Report

**Step 2:** In the Time Frame box, change the Range to 'This Month'

**Step 3:** Click Run Report

**Step 4:** Click 'Save As'

**Step 5:** Save this Report as 'Appointments MTD by Source' and Save it in the Report Folder: Appointments

**Step 6:** Click 'Save & Return to Report' button

**Step 7:** In the Time Frame box, change the Range to 'This Week'

**Step 8:** Click Run Report

**Step 9:** Click 'Save As'

**Step 10:** Save this Report as 'Appointments WTD by Source' and Save it in the Report Folder: Appointments

**Step 11:** Click 'Save' button

*Result: We now have three Reports Saved in the Appointments Report Folder: Appointments Week-to-date, Month-to-date and Year-to-date.*

**Last New Report Scenario:** Our Sales Manager would like to see the dollar amount of Sales that have been made during the time frames of Week-to-Date, Month-to-Date and Year-to-Date, and which marketing Sources brought us those Leads. We will need to create three reports, one for each Date Range. For these Reports, our Manager wants to Filter out any Sales that were Canceled or Rescinded.

#### **Demonstration: Build a Report using the Report Type 'Sales'**

**Step 1:** Go to the Reports Tab

**Step 2:** Click the 'New Report' button

**Step 3:** Select the Report Type of 'Sales' and click Create

*Result: The Report Builder tool is launched.*

**Step 4:** Change the Filters and Data Range at the top of the Report Editor

**Step 5:** Change the 'Show' Filter to show 'All Sales'

**Step 6:** Change the Data Field to 'Sold On' and select a Range of 'Current CY'

**Step 7:** Next to Filters click 'Add'

**Step 8:** Choose the Field 'Status' and select the operator of 'not equal to' and use the magnifying glass icon to select 'Canceled' as the Filter value.

*Result: Preview Pane shows a sample of records in which the Sold On Date was during the Current Calendar Year AND the Sale is not in a Canceled Status.*

**Step 9:** In the Field 'Quick Find' search for 'Source'

**Step 10:** Double-click on 'Source Name' or drag-and-drop the Source Name field into the Preview pane

**Step 11:** From within the Preview Pane, hover over the Source Name column and click the down Arrow

**Step 12:** Select 'Group by this Field'

*Result: Preview Pane shows the sample Sale records Grouped by the Source which brought your company the Lead information.*

**Step 13:** In the Field 'Quick Find' search for 'Sold Price'

**Step 14:** Double-click on 'Sold Price' or drag-and-drop the 'Sold Price' field into the Preview pane

**Step 15:** From within the Preview Pane, hover over the Sold Price column and click the down Arrow

**Step 16:** Select 'Summarize this Field' and then select the 'Sum' checkbox, Click Apply

**Step 17:** Click Run Report

**Step 18:** Click 'Save As'

**Step 19:** Save this Report as 'Sales YTD by Source' and Save it in the Report Folder: Sales

*Note: Be sure to Save your Reports in a Folder you will easily remember. You'll need to locate the Report later, when Building the Dashboard.*

#### **Demonstration: Clone and 'Save As' the Sales report for Month-to-Date and Week-to-Date Ranges**

**Step 1:** Run 'Sales YTD by Source' Report

**Step 2:** In the Time Frame box, change the Range to 'This Month'

**Step 3:** Click Run Report

**Step 4:** Click 'Save As'

**Step 5:** Save this Report as 'Sales MTD by Source' and Save it in the Report Folder: Sales

**Step 6:** Click 'Save & Return to Report' button

**Step 7:** In the Time Frame box, change the Range to 'This Week'

**Step 8:** Click Run Report

**Step 9:** Click 'Save As'

**Step 10:** Save this Report as 'Sales WTD by Source' and Save it in the Report Folder: Sales

**Step 11:** Click 'Save' button

**Result:** We now have three Reports Saved in the Sales Report Folder: Sales made Week-to-date, Month-to-date and Year-to-date including a Sum of the Sold Price of those Sales.

## PART 3: Dashboards

As we discussed earlier, dashboards are a way to visually display data from a report. There are several dashboards that come already created in your improveit 360 system. We'll first review a few of the key existing dashboards, then we will go over how you can create your own dashboards.

### Dashboards Tab

Dashboards can be easily accessed from the Dashboards tab in improveit 360. The dashboards tab provides a drop down list of all of the different dashboards that are available for you to view. Existing dashboards can also be edited, cloned (or copied), and refreshed from within the dashboard tab.

Note that clicking on a Dashboard Component will take you directly to the underlying Source Report.

### Refreshing a Dashboard

In order to make sure your dashboard is showing the most recent information, you can click the 'refresh' button on a dashboard to force the system to update all of the dashboard charts. You will notice that a red and white spinning icon will temporarily appear on each chart as it's being updated. Once it is updated, the spinner will disappear.

### Editing Dashboards

You have the ability to re-arrange the way the charts are shown, and also manipulate the data that's shown in a dashboard by clicking the 'Edit' button when viewing a dashboard. You can also edit a dashboard from within the Reports tab – as you may recall, dashboards are also shown in the list of report folders and reports. Simply select the gray arrow to the left of the dashboard name and choose the 'Edit' option.

**Scenario: Let's say we want the Active Projects Aging chart to display at the top of the Column.**

In addition to rearranging how the charts appear on a dashboard, you can also make the following changes in the dashboard editor:

- Change the width of the dashboard columns (select from narrow, medium, and wide width).
- Add or remove dashboard columns (note that there is a maximum of 3 columns per dashboard).
- Modify the individual settings for a chart on the dashboard including the chart type and values shown by clicking on the wrench icon.

- Delete an individual chart by clicking the 'X' icon on the chart.
- Change chart headings.
- Add footers to charts, which can serve as a description of the data being displayed.
- Change the running user of a dashboard. The running user of a dashboard allows you to view the data as if you had a certain user's permissions. You can also choose to always run a dashboard as the logged in user – this is the most common setting, as it shows all dashboard data to the user that they would normally be able to see throughout the system.
- Change the dashboard properties, including the folder that the dashboard id stored in, along with the dashboard name.

## PART 4: Creating a Custom Dashboard

**Scenario: We want to create a new dashboard and include the data from the reports that we created earlier. We will have three columns, one for each Time Frame: Week-to-Date, Month-to-Date and Year-to-Date.**

Now that we know a little bit about the dashboard editor, let's walk through how to create a new dashboard from scratch. This will also help you get familiar with how dashboard charts are configured, so that you know how you can make changes to existing charts in the future.

### Demonstration: Create a Dashboard and Configure its component charts

**Step 1:** *Go to the Reports Tab, click New Dashboard*

**Result:** *The Dashboard Builder tool and Preview pane appear*

**Step 2:** *Drag a Dashboard Component into the Preview pane, for this example we will use Donut charts*


**Step 3:** *Click the 'Data Sources' Tab to locate a Source Report*

**Step 4:** *Drag and drop the Report into the Component builder*

**Step 4:** *Use the Wrench Icon to Edit the Attributes of the Chart*

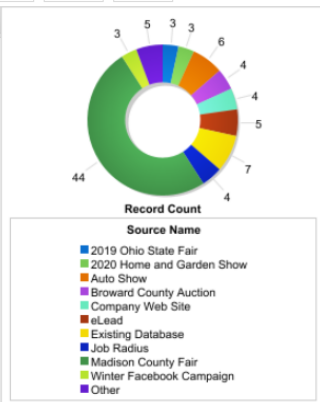
**Result:** *The Component Editor will appear. There are two Tabs in the Component Editor: Component Data and Formatting. Let's start with Component Data.*

**Component Editor** Help for this Page

Select Type: 

**Component Data** | **Formatting**


Values: Record Count  
 Wedges: Source Name  
 Display Units: Whole Units  
 Drill Down to: Source Report



OK Cancel

**Step 5:** On the 'Component Data' Tab, Set the following:  
*Values:* Choose the Summary Field or in this case, Record Count  
*Wedges:* Choose the Grouping level  
*Display Units:* Select Whole Units

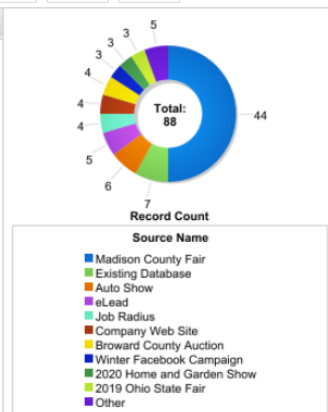
**Component Editor** Help for this Page

Select Type: 

**Component Data** | **Formatting**

Sort Rows By: Value Descending  
 Maximum Values Displayed:   
 Legend Position: Bottom

Data Labels:  Combine Small Groups into "Others"  
 Show Values  
 Show %  
 Show Details on Hover  
 Show Total

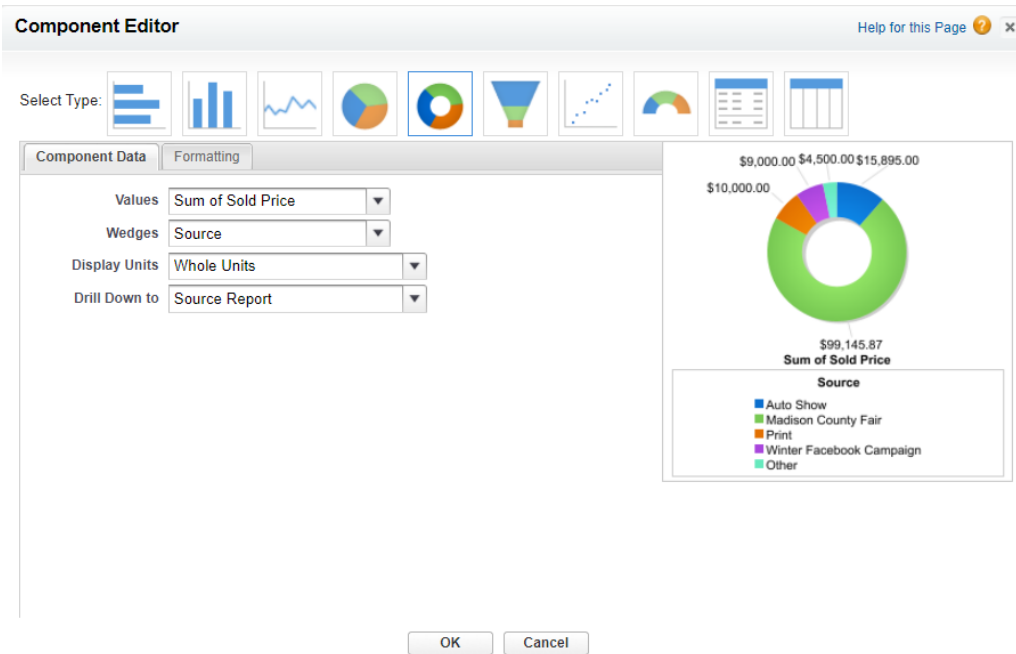


OK Cancel

**Step 6:** On the Formatting Tab, Set the following and then click Ok:  
*Sort Rows By:* Value Descending  
*Data Labels:* Combine Small Groups into 'Others' – True  
*Data Labels:* Show Values – True  
*Data Labels:* Show Details on Hover – True  
*Data Labels:* Show Total – True

**Step 7:** Continue adding Components and Data Source reports

Note: When working with Sales Reports, we are summarizing the 'Sold Price'. In the Component Editor for the Sales chart, be sure to select the Sum of the Sold Price for the Values on the 'Component Data' Tab. (see screen shot below)



**Component Editor** Help for this Page ? x

Select Type: [Icons for various chart types]

**Component Data** Formatting

Values: Sum of Sold Price

Wedges: Source

Display Units: Whole Units

Drill Down to: Source Report

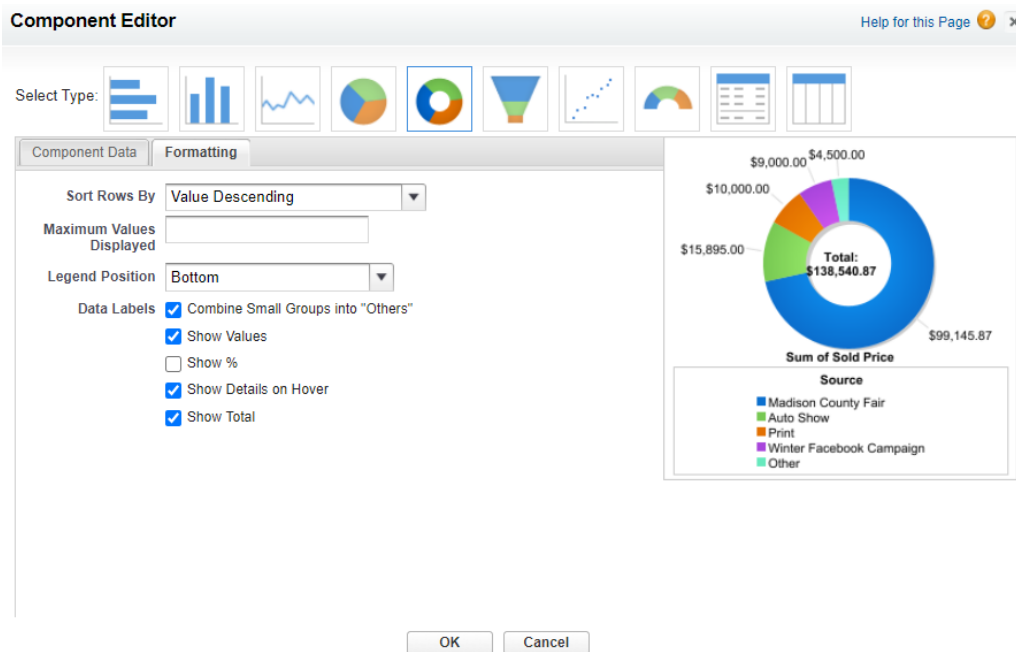
Sum of Sold Price: \$99,145.87

Source

- Auto Show
- Madison County Fair
- Print
- Winter Facebook Campaign
- Other

OK Cancel

Note: You may choose to 'Display Units' in Thousands or Millions if you are pulling data for Annual Sales volume.



**Component Editor** Help for this Page ? x

Select Type: [Icons for various chart types]

**Component Data** Formatting

Sort Rows By: Value Descending

Maximum Values Displayed: [Input field]

Legend Position: Bottom

Data Labels

- Combine Small Groups into "Others"
- Show Values
- Show %
- Show Details on Hover
- Show Total

Sum of Sold Price: \$138,540.87

Source

- Madison County Fair
- Auto Show
- Print
- Winter Facebook Campaign
- Other

OK Cancel

Note: 'Sort Rows By: Value Descending' assures that the largest dollar amount of Sales represents the largest piece of the pie or donut chart.

**Step 8:** Continue adding Components and Data Source report

**Step 9:** Save, be sure to select the appropriate Dashboard Folder when saving.

*Note: If you are building a Dashboard and are not ready for your team to see it, you can Save it in the 'My Personal Dashboards' folder, preventing other Users from seeing it. When you are ready to Share it with your team, you can move the Dashboard to a Folder that is Shareable.*

**Save Dashboard** ✕

Title

Dashboard Unique Name  i

**Folder**  
To avoid exposing sensitive data to the wrong people, choose a folder visible only to the right users.

Save to

#### PART 4: Appointment Reporting “Count” Fields

When choosing a Report Type that includes Appointments, you will have access to Fields on the Appointment which “Count” if the Appointment was Issued, Demoed, Sold or Canceled (as well as a few others). These Fields are based on the Result of the Appointment. Only and Appointment that has been Resulted as Demoed Not Sold OR Sold will Count a value of 1 in the ‘Demo’ Field. This allows your company to Sum the number of Demoed Appointments and Issued Appointments. This is an important concept to understand, as any Appointment that has not been Resulted, will not be given a value of 1 in the desired Reporting Fields.

For example: improveit 360 counts an “Issued” Appointment as any Appointment that has been Resulted, but does NOT have a Result of Canceled, Not Confirmed, or Not Covered.

See the Appointment Reporting Fields chart below:



<----Reporting Fields---->

Result	Disregard in Statistics	Sold	One Leg	Not Run	Not Covered	Close	Demo	Not Demoed	Not Confirmed	No Show	Follow-up	Demoed, Not Sold	Canceled	Drop	Issue	Run	Sit
ANY RESULT + Disregard	X																
Sold																	
One leg																	
Not Run																	
Not Demoed																	
Not Covered																	
Not Confirmed																	
No Show																	
Follow-up																	
Demoed, Not Sold																	
Canceled																	

**Summary**

Disregard in Statistics	Nothing
Sold	Sold, Close, Demo, Issue, Run, Sit
One leg	One leg, Issue, Run
Not Run	Not Run, Issue
Not Demoed	Not Demoed, Issue, Run, Sit
Not Covered	Not Covered, Drop
Not Confirmed	Not Confirmed, Drop
No Show	No Show, Issue, Run
Follow-up	Demo, Follow-up, Issue, Run, Sit
Demoed, Not Sold	Demo, Demoed Not Sold, Issue, Run, Sit
Canceled	Canceled, Drop

**Definitions**

Sold	The prospect bought your product and/or signed a contract. This will create a Sale in the system.
Demoed, Not Sold	The sales pitch was completed (a quote was left with the prospect) but the deal was not closed (no signed contract).
Follow-up	The product was demoed (or partially demoed) but a follow-up action is needed to close the deal, such as a new price quote or a modified design.
Not Demoed	The product demo was not given. This could be due to the prospect not being properly qualified, the appointment being interrupted, etc.
One Leg	Only one decision maker was present during the appointment and both are required.
No Show	The prospect was not present for the demonstration.
Not Run	The sales rep did not make it to the appointment.
Not Covered	The appointment was not run due to an issue with your company. For example, the sales rep was double-booked.
Not Confirmed	The appointment was not confirmed by your company and therefore was not run. This is contingent on your company's specific confirmation practices.
Canceled	The appointment was requested to be canceled by the prospect.



**New Scenario:** Our Sales Manager would like to see how many Appointments have been Issued, how many Demoed and how many Sold. He would like to Group that information by the assigned Sales Rep. We will need to create an Appointment Report and pull in the 'Count' fields for "Issue", "Demo" and "Sold".

### Demonstration: Edit and 'Save As' the Appointments YTD report

*Step 1: Run 'Appointments YTD by Source' Report*

*Step 2: In the 'Summarize information by' section, change the Field to 'Sales Rep 1'*

*Step 3: Click Run Report*

*Step 4: Click the 'Customize' button*

*Step 5: In the 'Quick Find' search for the Field: 'Issue'*

*Step 6: Double-click on 'Issue' or drag-and-drop the 'Issue' field into the Preview pane*

*Step 7: From within the Preview Pane, hover over the Issue column and click the down Arrow*

*Step 8: Select 'Summarize this Field' and then select the 'Sum' checkbox, Click Apply*

*Step 9: In the 'Quick Find' search for the Field: 'Demo'*

*Step 10: Double-click on 'Demo' or drag-and-drop the 'Demo' field into the Preview pane*

*Step 11: From within the Preview Pane, hover over the Demo column and click the down Arrow*

*Step 12: Select 'Summarize this Field' and then select the 'Sum' checkbox, Click Apply*

*Step 13: In the 'Quick Find' search for the Field: 'Sold'*

*Step 14: Double-click on 'Sold' or drag-and-drop the 'Sold' field into the Preview pane*

*Step 15: From within the Preview Pane, hover over the Sold column and click the down Arrow*

*Step 16: Select 'Summarize this Field' and then select the 'Sum' checkbox, Click Apply*

*Result: The Preview pane shows the total Appointments Issued, Demoed and Sold as well as the total Records (Appointments) for each Sales Rep.*

*Step 17: Click Run Report*

*Step 18: Click 'Save As'*

*Step 19: Save this Report as 'Appointment Summary by Rep YTD' and Save it in the Report Folder: Appointments*

*Step 20: Click 'Save' button*

### Course Summary

Today, we covered:

- Using single object Report Types to build reports for one record type at a time
- What Report Formats are and how to work with Tabular and Summary formats
- How to Group Summary Reports by specific fields
- How to SUM the values of a specific field
- How to Run, and Sort Report Data
- How to Create a Dashboard and configure Dashboard Components
- Appointment Reporting Summary Fields – Issue, Demo, Sold

Remember that you always have access to help and information at <https://support.improveit360.com> and through the 'Help' Portal within your improveit 360 system.