

BDO Salesforce Reporting Exercises

Service Sessions: Create a list of service sessions that include ONLY e-commerce in topics discussed.

Filtering: You are looking to limit a report by select fields.

- Start with the standard report entitled “List of Service Sessions” and click on “Edit” to customize the report.
- Search on the left hand side for “Topics Discussed” and then drag this into the filter section. A pop-up box will appear – select “Includes” (under the “Operator” drop down menu) and type “Ecommerce” in the blank below.
- Make sure “All service sessions” are selected in the Show field.
- Take out one of the columns you don’t need.
- Once you are happy with your report, click on the top-right arrow near “Save” and “Save As”.
- Name your report and add a description if needed.
- Save the report under your organization’s folder. Run the report.

Loans: Create a list of loans per industry including business owner demographic fields.

Grouping: Creates a summary report that can be used to visualize data and analyze.

- Start with the standard report entitled “List of Loans” and click on “Edit” to customize the report.
- Search for borrower demographic fields:
 - Borrower: Client Age
 - Borrower: Gender
 - Borrower: Highest Grade Completed
 - *And any other fields you would like to see in your report.*
- Then drag them into the “Columns” section.
- Search for “Small Business: Industry (NAIC)” and drag it to the “Group Rows” section.
- Take out any of columns you don’t need and arrange them in the order you prefer by dragging them.
- Once you are happy with your report, by viewing it in the preview window, click on the top-right arrow near “Save” and “Save As”.
- Name your report and add a description if needed.
- Save the report under your organization’s folder. Run the report.

TIP: If you group your report by a date field in your report, you can click the arrow to the right of the column name, select **Group Dates By**, and specify the grouping time frame: day, week, month, quarter, year, etc.