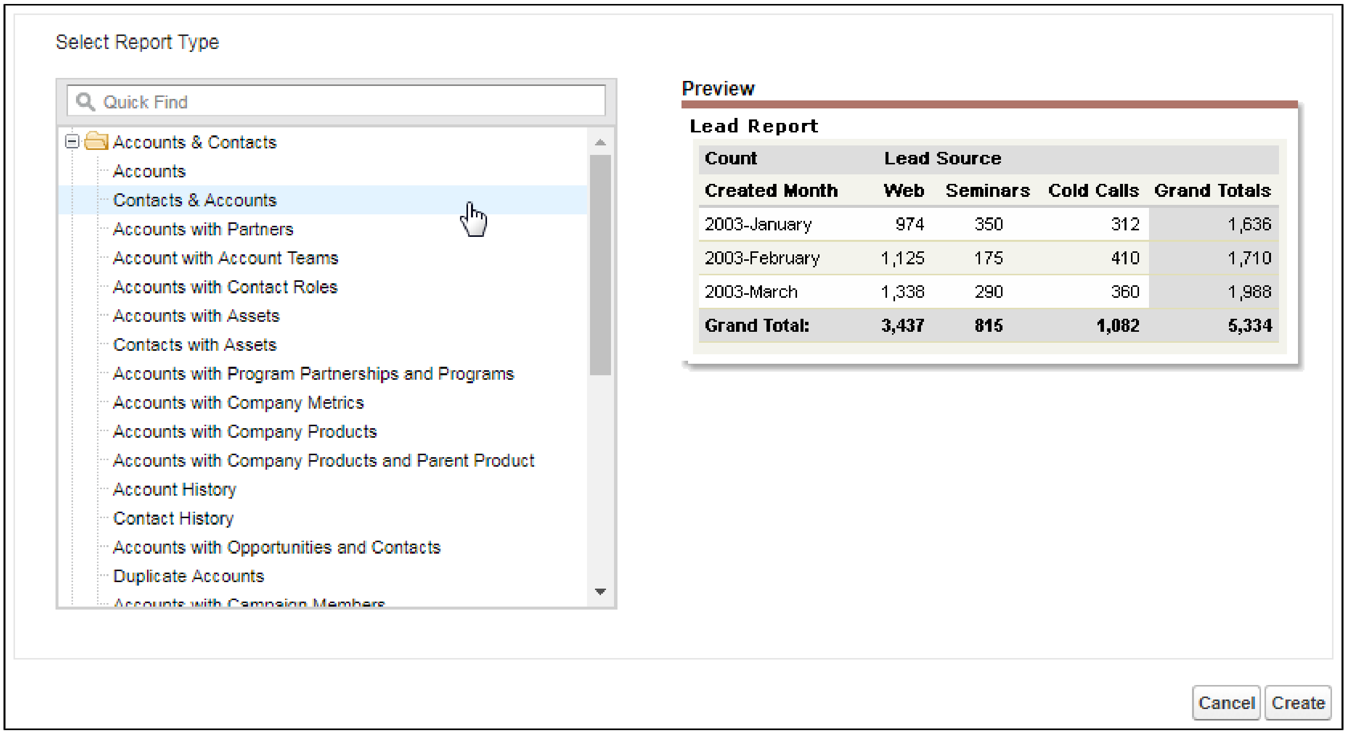
Creating a New Report

Navigate to the **Reports** tab and click **New Report**.

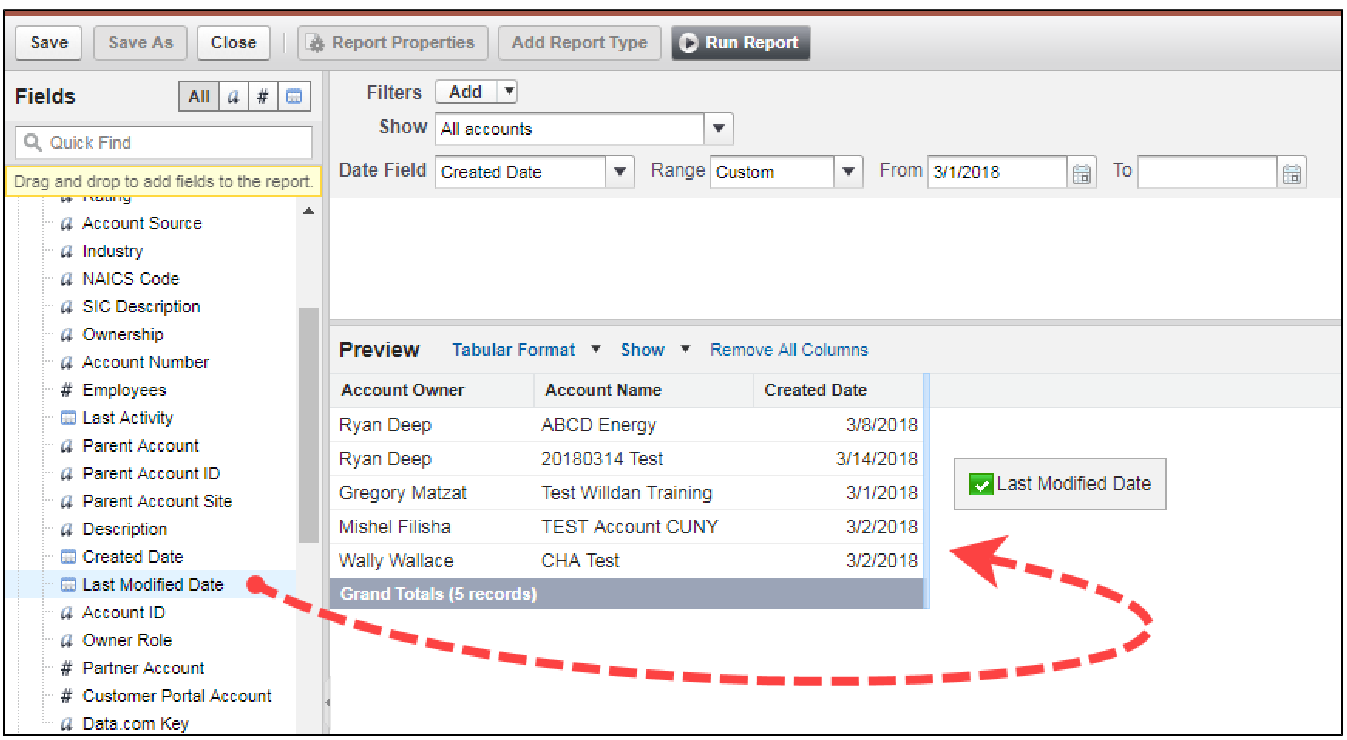
Select the desired **Report Type** (i.e. the types of objects in your report, such as **Accounts** or **Opportunities**). Keep in mind that Salesforce include several pre-constructed report filters (e.g. **Contacts & Accounts**) that you can use as the basis for your report.



Click **Create**.

Adding Fields to a Report

To add a new field to the report, locate it in the **Fields** sidebar and drag and drop it onto the **Preview** table.



Adding Filter Criteria to a Report

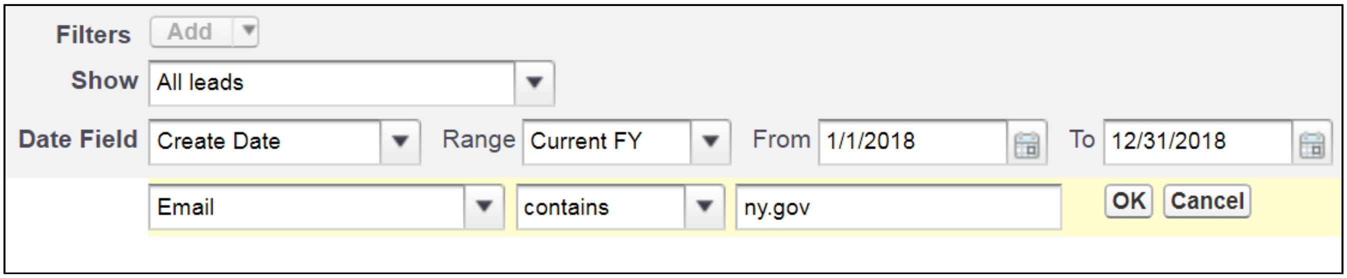
In the **Filter** section, click **Add**.

Select the follow details:

- **Field:** Select the field for your filter.
- **Operator:** Select the logical operator for your filter. For example, fields typically have operators that allow you to choose how to include different textual or numeric details (equals, greater than, starts with, etc.)
- **Details:** Enter the text or number details for your filter. If there are predefined values, the **Picklist** icon displays.

Click **OK** to save the filter.

The image below shows a filter that locates all email addresses that contain the text "ny.gov."



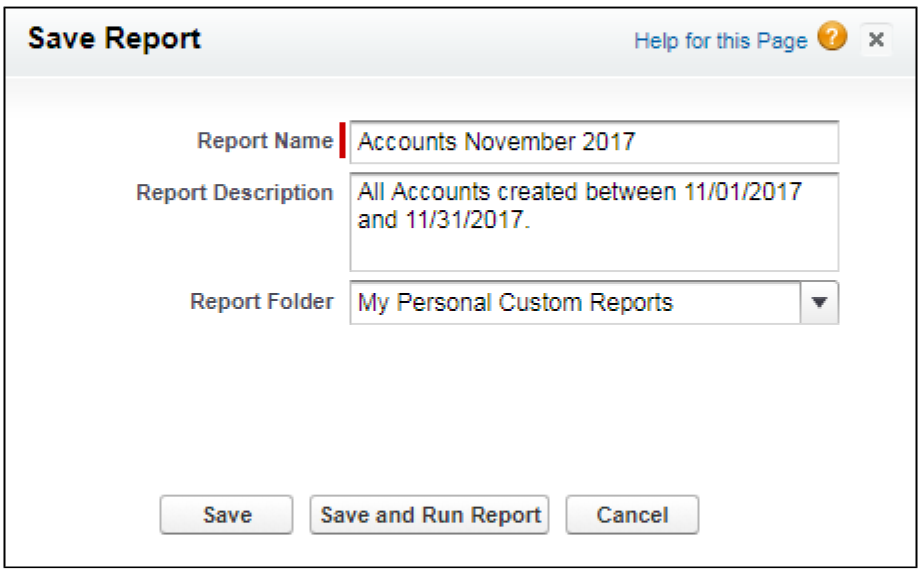
There are different types of filters you can add:

- **Field Filter:** Select a field value for the filter.
- **Cross Filter:** Select to display records based on their relationship with other objects (e.g. Accounts w/ Opportunities).
- **Row Limit:** Select to show a certain number of records on the report (e.g. Top Five Accounts by Annual Revenue).

Saving a Report

To save your report, click **Save**. This opens the **Save Report** window where you can enter the following details:

- Report Name
- Report Description
- Report Folder



Click **Save** to save the report for a later date or **Save and Run Report** to save and view it immediately.

> To create a new report from and existing one, click **Save As** and enter a new report name. This will create a copy of the original report that you can modify without affecting the original report's criteria.