

# 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.

Select Report Type

Quick Find

Accounts & Contacts

Accounts

Contacts & Accounts

Accounts with Partners

Account with Account Teams

Accounts with Contact Roles

Accounts with Assets

Contacts with Assets

Accounts with Program Partnerships and Programs

Accounts with Company Metrics

Accounts with Company Products

Accounts with Company Products and Parent Product

Account History

Contact History

Accounts with Opportunities and Contacts

Duplicate Accounts

Accounts with Campaign Members

Preview

Lead Report

Count	Lead Source			
Created Month	Web	Seminars	Cold Calls	Grand Totals
2003-January	974	350	312	1,636
2003-February	1,125	175	410	1,710
2003-March	1,338	290	360	1,988
Grand Total:	3,437	815	1,082	5,334

Cancel

Create

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.

Save Save As Close Report Properties Add Report Type Run Report

Fields

Quick Find

Drag and drop to add fields to the report.

Account Source

Industry

NAICS Code

SIC Description

Ownership

Account Number

Employees

Last Activity

Parent Account

Parent Account ID

Parent Account Site

Description

Created Date

Last Modified Date

Account ID

Owner Role

Partner Account

Customer Portal Account

Data.com Key

Filters

Add

Show

All accounts

Date Field

Created Date

Range

Custom

From

3/1/2018

To

Preview

Tabular Format

Show

Remove All Columns

Account Owner	Account Name	Created Date
Ryan Deep	ABCD Energy	3/8/2018
Ryan Deep	20180314 Test	3/14/2018
Gregory Matzat	Test Willdan Training	3/1/2018
Mishel Filisha	TEST Account CUNY	3/2/2018
Wally Wallace	CHA Test	3/2/2018
Grand Totals (5 records)		

✓ Last Modified Date

## Adding Filter Criteria to a Report

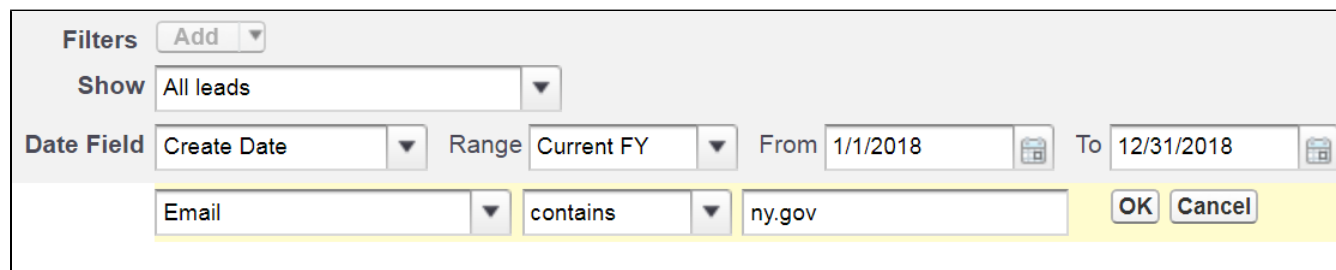
In the **Filter** section, click **Add**.

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."



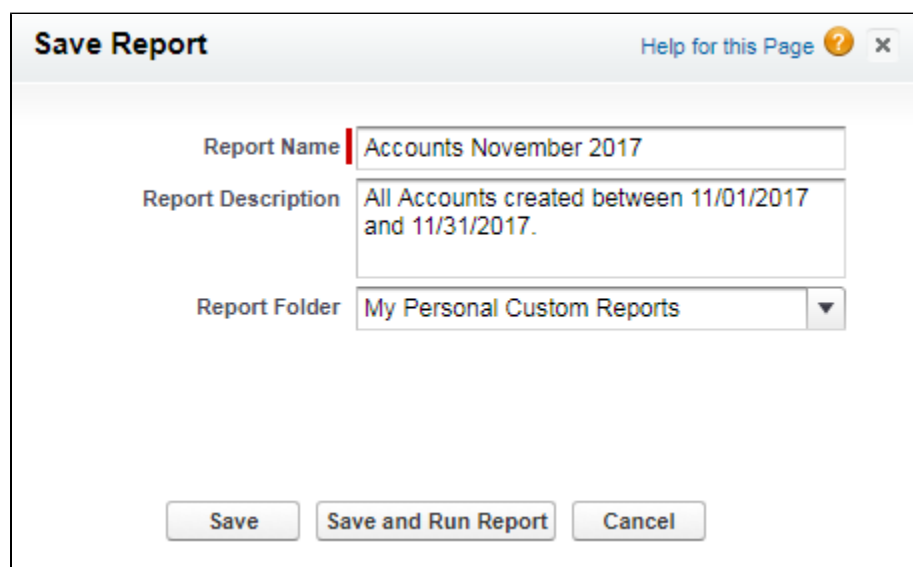
There are different types of filters you can add:

- **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 an 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.