



User Guide

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Description

ReportBoost is a 100% Salesforce Native application that adds a layer of visualization on top of existing Salesforce reports.

Key Features

- **Runs on top of Salesforce reports** so you can get more value from the reports that you already use
- **A graphical display of the occurrence frequency** of all of a report's data values so you can get quick insight into patterns without doing extra configuration
- **Sortable columns** allow you to quickly arrange summary data to find informative patterns
- **Filtering on summarized values** gives you the power to drill into your data with just a few clicks (see exceptions)

Exceptions and Limitations

- Report Types: ReportBoost works with tabular, summary and matrix reports, but **does not** currently support joined reports
- Rich Text Fields: Filtering is supported for rich text fields, but could be unreliable due to markup included in rich text values (see [Filtering by Rich Text Fields](#) below)
- Date Summary Fields: Filtering **is not** supported on date-type summary fields that are grouped (e.g. a date field grouped by calendar month)

Installation

Get it on the AppExchange

User Setup

User Licenses

ReportBoost is licensed on a per-user basis. To assign an app license to a user, follow the steps in this Salesforce article:

https://help.salesforce.com/s/articleView?id=sf.distribution_managing_licenses.htm&type=5

Granting App Access

During installation, you will have options to “Install for Admins Only”, “Install for All Users”, or “Install for Specific Profiles...”. More information about those options can be found here:

https://help.salesforce.com/s/articleView?id=sf.distribution_installing_packages.htm&type=5

ReportBoost Permission Set

If your user access requirements do not exactly align with security profiles, ReportBoost includes a Permission Set called “ReportBoost User” that you can use to give access to specific people.

For example, if you have thirty users spread across three security profiles, but you only want to grant access to four of the users, you can install ReportBoost for Admins only, then assign the “ReportBoost User” permission set to those four users.

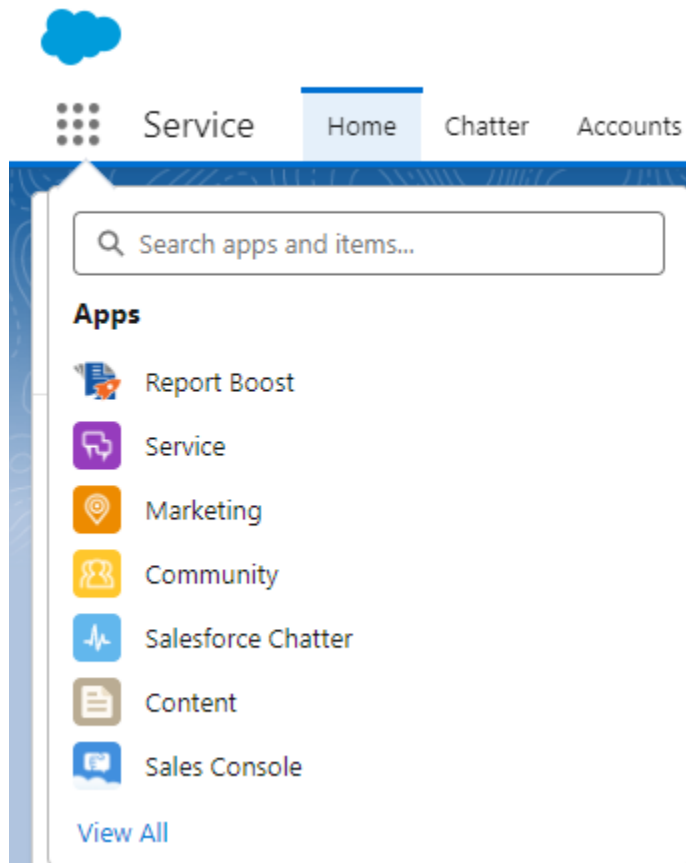
For more details on assigning permission sets see this article:

https://help.salesforce.com/s/articleView?id=sf.perm_sets_manage_assignments.htm&type=5

Using the App

Accessing the App

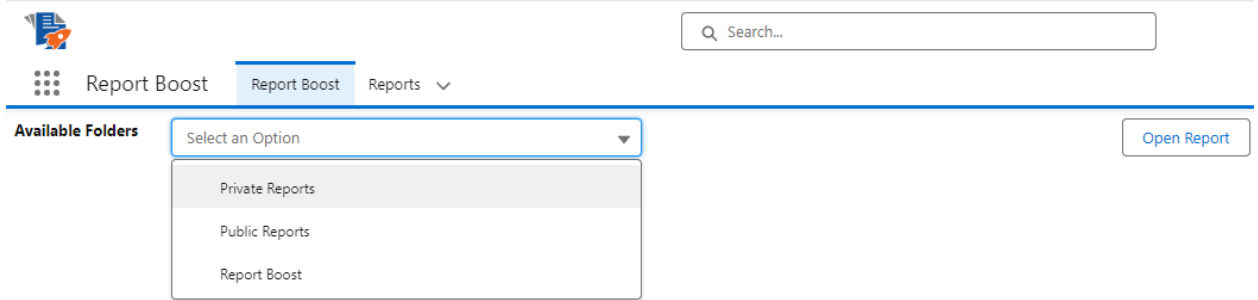
- From the waffle icon in the upper-left corner, click on “Report Boost”.



- If you don't see Report Boost in your recent apps, look for it under View All.
- If you still don't see “Report Boost” under View All, contact your Salesforce Administrator to see if you have permissions to access the app.

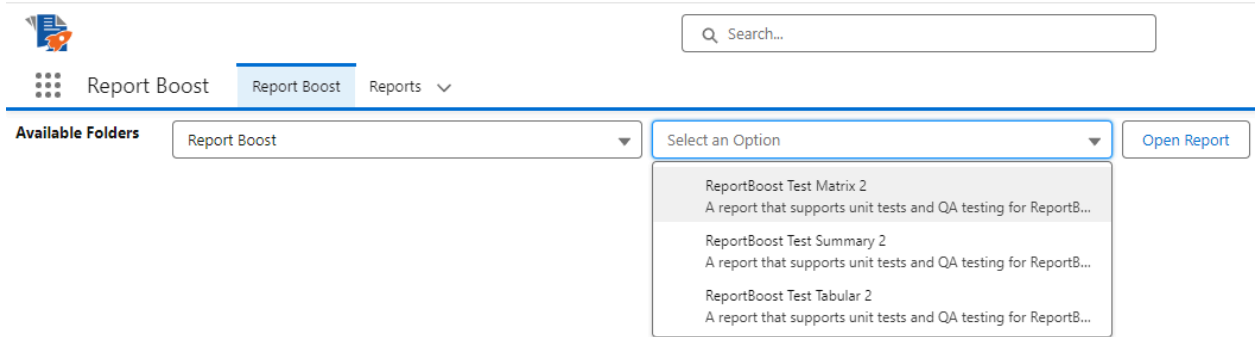
Running a Report

- In the Report Boost tab, the Available Folders drop down list shows all Report Folders that you have access to



** Note: ReportBoost will only display the first 2000 folders that you have access to. If you need visibility to more than 2000 folders, please contact us.

- When you click on a folder in the list, ReportBoost displays a list of Reports in the Folder you selected
- Each option shows the report name, and report description.



- When you click a report option, the report is immediately run, and results are displayed

Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types	Close Date	Created Date	Next Step
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Installations	\$120,000.00	Good Stuff	8/19/2022	8/23/2022	-
64.5% (20)	25.8% (8)	38.1% (18)	32.3% (10)	9.7% (3)	9.7% (3)	67.7% (21)	8.5% (2)	100% (31)	100% (31)
New Customer	-	Id. Decision Makers	Chicago	Edge Emergency Generator	\$270,000.00	Bad Stuff	5/17/2022	-	-
25.8% (8)	22.6% (7)	9.7% (3)	16.1% (5)	6.5% (2)	9.7% (3)	25.8% (8)	3.2% (1)	-	-
-	Partner	Proposal/Price Quote	Austin	United Oil Refinery Generators	\$100,000.00	-	6/10/2022	-	-
6.5% (2)	16.1% (5)	6.5% (2)	12.9% (4)	6.5% (2)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
Existing Customer - Replacement	Word of mouth	Value Proposition	Tucson	University of AZ Installations	\$50,000.00	-	5/6/2022	-	-
3.2% (1)	9.7% (3)	6.5% (2)	9.7% (3)	3.2% (1)	6.5% (2)	-	3.2% (1)	-	-
-	Employee Referral	Negotiation/Review	Portland	Edge Installation	\$60,000.00	-	8/25/2022	-	-
-	8.5% (2)	6.5% (2)	9.7% (3)	3.2% (1)	6.5% (2)	-	3.2% (1)	-	-
New Customer	Word of mouth	Closed Won	Austin	Edge Emergency Generator	\$75,000.00	Bad Stuff	8/19/2022	8/23/2022	-
Existing Customer - Upgrade	Employee Referral	Proposal/Price Quote	Tucson	University of AZ Installations	\$100,000.00	Good Stuff	5/17/2022	8/23/2022	-
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge Installation	\$50,000.00	Good Stuff	6/10/2022	8/23/2022	-
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge SLA	\$60,000.00	Good Stuff	5/6/2022	8/23/2022	-
Existing Customer - Replacement	-	Id. Decision Makers	Austin	Edge Emergency Generator	\$35,000.00	Good Stuff	8/25/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Perception Analysis	Portland	Express Logistics SLA	\$120,000.00	Good Stuff	5/15/2022	8/23/2022	-
Existing Customer - Upgrade	-	Id. Decision Makers	Chicago	Grand Hotels Kitchen Generator	\$15,000.00	Good Stuff	5/11/2022	8/23/2022	-
-	-	Id. Decision Makers	Mountain View	GenePoint Lab Generators	\$60,000.00	-	8/13/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Value Proposition	Portland	Express Logistics Portable Truck Generators	\$80,000.00	Good Stuff	5/14/2022	8/23/2022	-
Existing Customer - Upgrade	-	Proposal/Price Quote	New York	United Oil Refinery Generators	\$270,000.00	Good Stuff	8/4/2022	8/23/2022	-
New Customer	Web	Closed Won	Burlington	Burlington Textiles Weaving Plant Generator	\$235,000.00	Bad Stuff	6/25/2022	8/23/2022	-
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Office Portable Generators	\$125,000.00	Good Stuff	6/20/2022	8/23/2022	-
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Installations	\$270,000.00	Good Stuff	6/16/2022	8/23/2022	-
Existing Customer - Upgrade	Employee Referral	Value Proposition	Chicago	Grand Hotels Guest Portable Generators	\$250,000.00	Good Stuff	8/19/2022	8/23/2022	-
New Customer	Public Relations	Closed Won	Tucson	University of AZ Portable Generators	\$50,000.00	Bad Stuff	5/20/2022	8/23/2022	-

- To run a different report, select it from the list of Reports in the selected Folder

The screenshot shows the 'Report Boost' interface. At the top, there is a search bar and navigation tabs for 'Report Boost' and 'Reports'. Below this, there are two dropdown menus: 'Available Folders' (set to 'Report Boost') and 'ReportBoost Test Matrix 2'. A dropdown menu is open for the second dropdown, showing three options:

- ReportBoost Test Matrix 2
A report that supports unit tests and QA testing for ReportB...
- ReportBoost Test Summary 2
A report that supports unit tests and QA testing for ReportB...
- ReportBoost Test Tabular 2
A report that supports unit tests and QA testing for ReportB...

Below the dropdowns is a table with the following columns: Title, Mailing State/Province, Salutation, First Name, Last Name, and Account. The table contains several rows of test data, including entries for 'SVP, Operations', 'SVP, Administration and Finance', 'VP, Facilities', 'CFO', and various 'Testing Person' entries.

Title	Mailing State/Province	Salutation	First Name	Last Name	Account
-	-	Test	2c16aTest	Contact2c16a	Unit
1.2% (3)	98.8% (243)	91.5% (225)	0.4% (1)	0.4% (1)	1.6%
SVP, Operations	CA	0c19aTest	Contact0c19a	Test	
0.8% (2)	0.4% (1)	Ms.	0.4% (1)	0.4% (1)	1.2% (3)
SVP, Administration and Finance	KS	4.1% (10)	1c46aTest	Contact1c46a	Test Account 19
0.8% (2)	0.4% (1)	Mr.	0.4% (1)	0.4% (1)	1.2% (3)
VP, Facilities	NC	3.7% (9)	0c64aTest	Contact0c64a	Test Account 46
0.8% (2)	0.4% (1)	-	0.4% (1)	0.4% (1)	1.2% (3)
CFO	-	0.4% (1)	2c27aTest	Contact2c27a	Test Account 64
0.8% (2)	-	Mr	0.4% (1)	0.4% (1)	1.2% (3)
Testing Person2c16a	-	Test	2c16aTest	Contact2c16a	Test Account 16
Testing Person0c19a	-	Test	0c19aTest	Contact0c19a	Test Account 19
Testing Person1c46a	-	Test	1c46aTest	Contact1c46a	Test Account 46
Testing Person0c64a	-	Test	0c64aTest	Contact0c64a	Test Account 64
Testing Person2c27a	-	Test	2c27aTest	Contact2c27a	Test Account 27
Testing Person0c30a	-	Test	0c30aTest	Contact0c30a	Test Account 30
Testing Person1c57a	-	Test	1c57aTest	Contact1c57a	Test Account 57
Testing Person1c0a	-	Test	1c0aTest	Contact1c0a	Test Account 0
Testing Person1c59a	-	Test	1c59aTest	Contact1c59a	Test Account 59
Testing Person0c41a	-	Test	0c41aTest	Contact0c41a	Test Account 41
Testing Person1c24a	-	Test	1c24aTest	Contact1c24a	Test Account 24
-	-	Mr.	Jake	Llorrac	sForce

- To run reports from a different folder, select the folder in the Available Folders list

The screenshot shows the 'Report Boost' interface. At the top, there is a search bar and navigation tabs for 'Report Boost' and 'Reports'. Below this, the 'Available Folders' dropdown is open, showing options for 'Private Reports', 'Public Reports', and 'Report Boost' (which is selected). The main table below has columns for 'Title', 'Account Name', and 'Mailing Street'. The table contains various test entries and real data rows.

Title	Account Name	Mailing Street
1.2% (3)	United Oil & Gas Corp.	-
SVP, Operations	CA	92.3% (227)
0.8% (2)	Ms.	The Landmark @ One Market
SVP, Administration and Finance	KS	0.4% (1)
0.8% (2)	Mr.	Kings Park, 17th Avenue, Team Valley
VP, Facilities	NC	0.4% (1)
0.8% (2)	-	1303 Avenue of the Americas N
CFO	0.4% (1)	0.4% (1)
0.8% (2)	Mr.	345 Shoreline Park Mountain Vie
Testing Person2c16a	2c16aTest	-
Testing Person0c19a	0c19aTest	-
Testing Person1c46a	1c46aTest	-
Testing Person0c64a	0c64aTest	-
Testing Person2c27a	2c27aTest	-
Testing Person0c30a	0c30aTest	-
Testing Person1c57a	1c57aTest	-
Testing Person1c0a	1c0aTest	-
Testing Person1c59a	1c59aTest	-
Testing Person0c41a	0c41aTest	-
Testing Person1c24a	1c24aTest	-
-	Mr. Jake Llorac	sForce

Report Summary Details

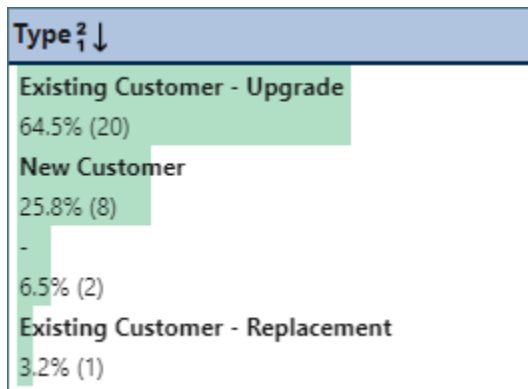
- The summary area summarizes all of the values that appear in each column of the report.

The screenshot shows the 'Report Boost' interface with a summary table. The 'Available Folders' dropdown is set to 'Public Reports'. The summary table has columns for 'Type', 'Lead Source', 'Stage', 'Billing City', 'Opportunity Name', 'Amount', and 'Good Types'. Each cell in the table displays a percentage and a count in parentheses.

Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Installations	\$120,000.00	Good Stuff
64.5% (20)	25.8% (8)	58.1% (18)	32.3% (10)	9.7% (3)	9.7% (3)	67.7% (21)
New Customer	-	Id. Decision Makers	Chicago	Edge Emergency Generator	\$270,000.00	Bad Stuff
25.8% (8)	22.6% (7)	9.7% (3)	16.1% (5)	6.5% (2)	9.7% (3)	25.8% (8)
-	Partner	Proposal/Price Quote	Austin	United Oil Refinery Generators	\$100,000.00	6.5% (2)
6.5% (2)	16.1% (5)	6.5% (2)	12.9% (4)	6.5% (2)	6.5% (2)	6.5% (2)
Existing Customer - Replacement	Word of mouth	Value Proposition	Tucson	University of AZ Installations	\$50,000.00	-
3.2% (1)	9.7% (3)	6.5% (2)	9.7% (3)	3.2% (1)	6.5% (2)	-
-	Employee Referral	Negotiation/Review	Portland	Edge Installation	\$60,000.00	-
-	6.5% (2)	6.5% (2)	9.7% (3)	3.2% (1)	6.5% (2)	-

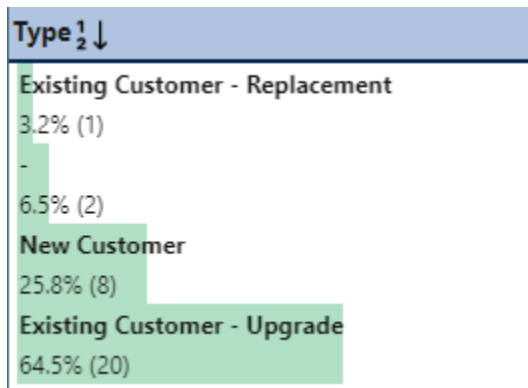
- Each result value is displayed along with:

- A horizontal bar showing the % of records with that value
- A number showing the % of records with that value
- A number showing the count of records with that value



Sorting Summary Values

- By default, the summary values in each column are displayed in descending order by the count of records that include each value (most frequent values first).
- Clicking on the column header will cycle through sorting the values by
 - a. By Count, ascending



b. Alphabetically by value, ascending (nulls first)

Type \uparrow \downarrow
-
6.5% (2)
Existing Customer - Replacement
3.2% (1)
Existing Customer - Upgrade
64.5% (20)
New Customer
25.8% (8)

c. Alphabetically by value, descending (nulls last)

Type \downarrow \uparrow
New Customer
25.8% (8)
Existing Customer - Upgrade
64.5% (20)
Existing Customer - Replacement
3.2% (1)
-
6.5% (2)

d. Back to By Count, descending

Type \downarrow \uparrow
Existing Customer - Upgrade
64.5% (20)
New Customer
25.8% (8)
-
6.5% (2)
Existing Customer - Replacement
3.2% (1)

Filtering by Summary Values

Selecting filter values

You can select and deselect one or more summary values, across multiple columns, for filtering, by clicking on them. Selected values get an orange block added to their left-hand side.

Type [?] ↓	Lead Source [?] ↓	Stage [?] ↓
Existing Customer - Upgrade 64.5% (20)	External Referral 25.8% (8)	Closed Won 58.1% (18)
New Customer 25.8% (8)	- 22.6% (7)	Id. Decision Makers 9.7% (3)
- 6.5% (2)	Partner 16.1% (5)	Proposal/Price Quote 6.5% (2)
Existing Customer - Replacement 3.2% (1)	Word of mouth 9.7% (3)	Value Proposition 6.5% (2)
	Employee Referral 6.5% (2)	Negotiation/Review 6.5% (2)

Filtering Logic

Filtering applies OR logic within each column, and AND logic across columns

For example, the selections shown above will look for records where (Type = “Existing Customer - Upgrade” OR “Existing - Customer - Replacement”) AND Stage = “Closed Won”

Running with Filters

To run the report with the selected filters, click the “Rerun Report With Selected Filters” button



The report is re-run with the additional filters that you selected

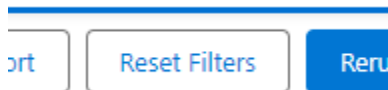
The screenshot shows the Report Boost interface with a search bar and navigation tabs. Below the navigation, there are dropdown menus for 'Available Folders' (Public Reports) and 'Opportunities by Account' (Opportunities by Account). Buttons for 'Open Report', 'Reset Filters', and 'Rerun Report With Selected Filters' are visible. The main table displays the following data:

Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types	Close Date	Cre
Existing Customer - Upgrade 100% (11)	External Referral 45.5% (5)	Closed Won 100% (11)	New York 45.5% (5)	United Oil Installations 18.2% (2)	\$90,000.00 18.2% (2)	Good Stuff 100% (11)	8/2/2022 9.1% (1)	8/2/2022 100%
	Partner 27.3% (3)		Chicago 18.2% (2)	Grand Hotels Generator Installations 18.2% (2)	\$120,000.00 18.2% (2)		5/13/2022 9.1% (1)	
	Word of mouth 18.2% (2)		Austin 18.2% (2)	Grand Hotels SLA 9.1% (1)	\$350,000.00 9.1% (1)		6/27/2022 9.1% (1)	
	Public Relations 9.1% (1)		Mountain View 9.1% (1)	United Oil Standby Generators 9.1% (1)	\$235,000.00 9.1% (1)		8/12/2022 9.1% (1)	
			Tucson 9.1% (1)	United Oil Emergency Generators 9.1% (1)	\$440,000.00 9.1% (1)		6/9/2022 9.1% (1)	

From here you can select and deselect filters and rerun the report again

Resetting Filters

If you want to run the report without any additional filters, click the Reset Filters button



Existing Report Filters

All filters that are already included in a Report will always be included in Report runs. Any summary value filters are applied on top of filters that are built into the Report.

Filtering by Rich Text fields

Filtering on Rich Text fields is enabled, but could produce unexpected results because of markup included in rich text values.

For example:

“This text with a **bold** value” is actually stored as

“This text with a <bold>bold</bold> value” in a rich text field

Filtering by “This text with a bold value” will not match the value stored in the field, and will not return the expected records.

Filtering by Grouped Date fields

It **is not** currently possible to filter by grouped Date fields in ReportBoost

Date fields in Salesforce reports can be grouped by time-periods

✓ Previewing a limited number of records. Run the report to see everything.

Created Date ↑	Salutation	First Name	Last Name	Title
8/23/2022 (5)			Gonzalez	SVP, Procure
			Forbes	CFO
Subtotal				
10/25/2023 (15)	Test	0c20aTest		
	Test	1c20aTest		
	Test	2c20aTest		
	Test	0-21-Test		

When a Date field is grouped by a time period, the value returned in the Report results is the name of the time period, rather than a date value or range of date values

Filtering for “August 2022” in a field containing Date values like “8/23/2022” won’t match any records.

✔ Previewing a limited number of records. Run the report to see everything

Created Date ↑ ▾	Salutation ▾	First Name ▾	Last Name ▾
August 2022 (5)	Ms.	Rose	Gonzalez
	Mr.	Sean	Forbes
	Mr.	Jack	Rogers
	Ms.	Pat	Stumuller
	Mr	Andy	Young
Subtotal			
October 2023 (15)	Test	0c20aTest	Contact0c20a
	Test	1c20aTest	Contact1c20a
	Test	2c20aTest	Contact2c20a
	Test	0c21aTest	Contact0c21a
	Test	1c21aTest	Contact1c21a
	Test	2c21aTest	Contact2c21a
	Test	0c18aTest	Contact0c18a

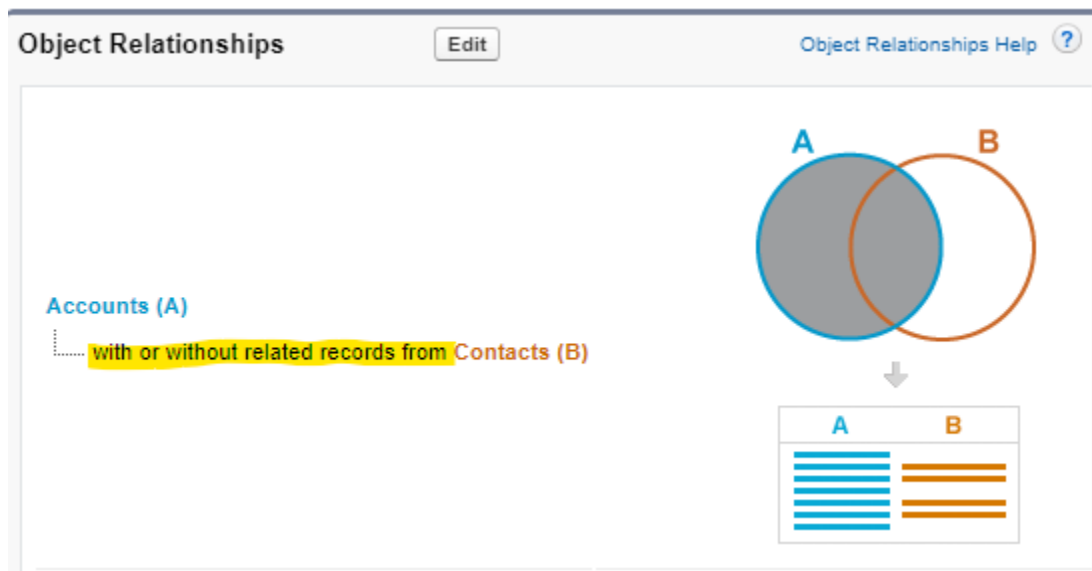
Selection of these grouped Date fields is disabled in the Summary area of ReportBoost, and indicated by gray highlighting when you hover over values in that column

Created Date	Salutation
October 2023	Test
91.5% (225)	91.5% (225)
August 2022	Ms.
8.1% (20)	4.1% (10)
-	Mr.
0.4% (1)	3.7% (9)
	-
	0.4% (1)
	Mr

Filtering in report types with Parent-Child relationships

... with or without related records

Some Report Types include a Parent-Child relationship that has “with or without related records” selected



When filtering in a report of this type, if you select a filter that is a field on the child object (in this case on Contacts), report results will also include rows for parent records that do not have any child records.

For example:

If you filter by one or more Last Name values (which is a field on Contact)

Created Date ² ↓ ₁ ↓	Salutation ² ↓ ₁ ↓	First Name ² ↓ ₁ ↓	Last Name ² ↓ ₁ ↓	Title ² ↓ ₁ ↓	Account Name ² ↓ ₁ ↓
October 2023 91.5% (225)	Test 91.5% (225)	- 0.4% (1)	- 0.4% (1)	- 1.2% (3)	United Oil & Gas Corp. 1.6% (4)
August 2022 8.1% (20)	Ms. 4.1% (10)	Pat 0.4% (1)	Stumuller 0.4% (1)	SVP, Administration and Finance 0.8% (2)	Test Account 29 1.2% (3)
- 0.4% (1)	Mr. 3.7% (9)	Andy 0.4% (1)	Young 0.4% (1)	SVP, Operations 0.8% (2)	Test Account 30 1.2% (3)
	Mr. 0.4% (1)	Tim 0.4% (1)	Barr 0.4% (1)	VP, Facilities 0.8% (2)	Test Account 31 1.2% (3)
	Mr. 0.4% (1)	John 0.4% (1)	Bond 0.4% (1)	CFO 0.8% (2)	Test Account 32 1.2% (3)

The report results include a number of records where Last Name and other Contact fields appear to be null

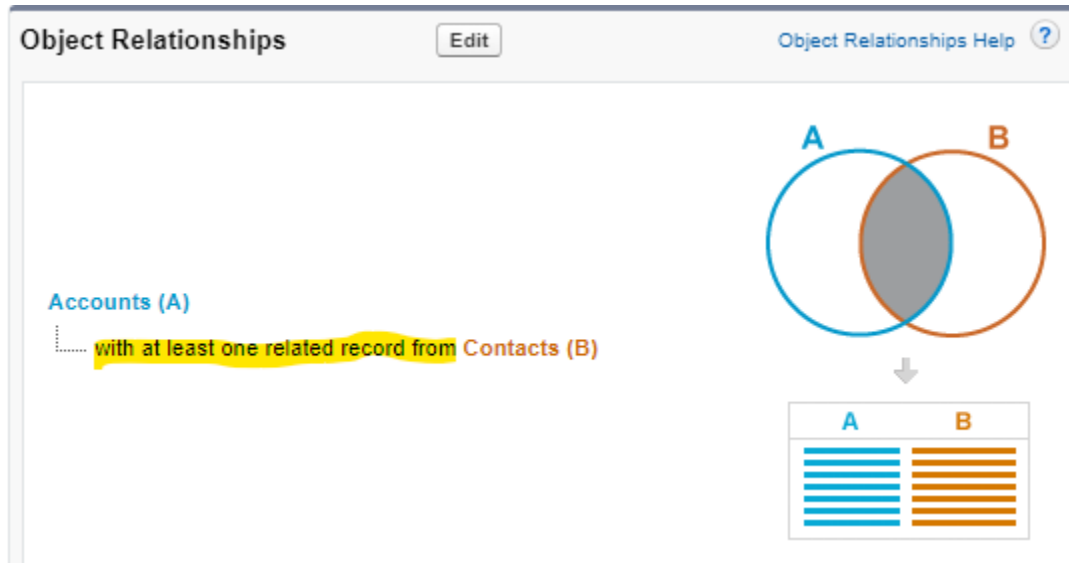
Created Date ² ↓ ₁ ↓	Salutation ² ↓ ₁ ↓	First Name ² ↓ ₁ ↓	Last Name ² ↓ ₁ ↓	Title ² ↓ ₁ ↓	Account Name ² ↓ ₁ ↓
- 97.7% (86)	- 97.7% (86)	- 97.7% (86)	- 97.7% (86)	- 97.7% (86)	Edge Communications 1.1% (1)
August 2022 2.3% (2)	Ms. 1.1% (1)	Pat 1.1% (1)	Stumuller 1.1% (1)	SVP, Administration and Finance 1.1% (1)	Burlington Textiles Corp of America 1.1% (1)
	Mr. 1.1% (1)	Andy 1.1% (1)	Young 1.1% (1)	SVP, Operations 1.1% (1)	United Oil & Gas, UK 1.1% (1)
					United Oil & Gas, Singapore 1.1% (1)
					GenePoint 1.1% (1)

These are actually parent records (in this case Account) that have no Contacts

This behavior might be difficult to work with in some cases, but is actually expected and correct behavior based on the structure of the Report Type.

... with at least one related record

By contrast, in a Report Type where “with at least one related record” is selected



Filtering by one or more Last Name values

Created Date ² ↓ 1 ↓	Salutation ² ↓ 1 ↓	First Name ² ↓ 1 ↓	Last Name ² ↓ 1 ↓	Title ² ↓ 1 ↓	Account Name ² ↓ 1 ↓
10/25/2023 91.8% (225)	Test 91.8% (225)	2c29aTest 0.4% (1)	Contact0c48a 0.4% (1)	SVP, Administration and Finance 0.8% (2)	United Oil & Gas Corp. 1.6% (4)
8/23/2022 8.2% (20)	Ms. 4.1% (10)	0c30aTest 0.4% (1)	Contact1c48a 0.4% (1)	SVP, Operations 0.8% (2)	Test Account 29 1.2% (3)
	Mr. 3.7% (9)	1c30aTest 0.4% (1)	Stumuller 0.4% (1)	VP, Facilities 0.8% (2)	Test Account 30 1.2% (3)
	Mr 0.4% (1)	2c30aTest 0.4% (1)	Young 0.4% (1)	CFO 0.8% (2)	Test Account 31 1.2% (3)
		0c31aTest 0.4% (1)	Barr 0.4% (1)	- 0.8% (2)	Test Account 32 1.2% (3)

Will also filter the parent object (Account) down to only parent records that have at least one child record (Contact) with Last Names that match your filter selection

Created Date	Salutation	First Name	Last Name	Title	Account Name
8/23/2022	Ms.	Pat	Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.
100% (2)	50% (1)	50% (1)	50% (1)	50% (1)	50% (1)
	Mr	Andy	Young	SVP, Operations	Dickenson plc
	50% (1)	50% (1)	50% (1)	50% (1)	50% (1)

Opening the Underlying Report

To open the underlying report in a new tab, click the “Open Report” button

Available Folders

Public Reports

New Accounts with Contacts Report

Open Report

Data View

In addition to summarized values, report results include a flattened view of the report data (without any groupings)

Bold values indicate grouping fields in the original report

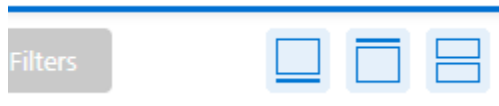
Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types	Close Date
New Customer	Word of mouth	Closed Won	Austin	Edge Emergency Generator	\$75,000.00	Bad Stuff	8/19/2022
Existing Customer - Upgrade	Employee Referral	Proposal/Price Quote	Tucson	University of AZ Installations	\$100,000.00	Good Stuff	5/17/2022
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge Installation	\$50,000.00	Good Stuff	6/10/2022
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge SLA	\$60,000.00	Good Stuff	5/6/2022
Existing Customer - Replacement	-	Id. Decision Makers	Austin	Edge Emergency Generator	\$35,000.00	Good Stuff	8/25/2022
Existing Customer - Upgrade	External Referral	Perception Analysis	Portland	Express Logistics SLA	\$120,000.00	Good Stuff	5/15/2022
Existing Customer - Upgrade	-	Id. Decision Makers	Chicago	Grand Hotels Kitchen Generator	\$15,000.00	Good Stuff	5/11/2022
-	-	Id. Decision Makers	Mountain View	GenePoint Lab Generators	\$60,000.00	-	8/13/2022
Existing Customer - Upgrade	External Referral	Value Proposition	Portland	Express Logistics Portable Truck Generators	\$80,000.00	Good Stuff	5/14/2022
Existing Customer - Upgrade	-	Proposal/Price Quote	New York	United Oil Refinery Generators	\$270,000.00	Good Stuff	8/4/2022
New Customer	Web	Closed Won	Burlington	Burlington Textiles Weaving Plant Generator	\$235,000.00	Bad Stuff	6/25/2022
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Office Portable Generators	\$125,000.00	Good Stuff	6/20/2022
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Installations	\$270,000.00	Good Stuff	6/16/2022
Existing Customer - Upgrade	Employee Referral	Value Proposition	Chicago	Grand Hotels Guest Portable Generators	\$250,000.00	Good Stuff	8/19/2022
New Customer	Public Relations	Closed Won	Tucson	University of AZ Portable Generators	\$50,000.00	Bad Stuff	5/20/2022
New Customer	Purchased List	Qualification	Lawrence	Dickenson Mobile Generators	\$15,000.00	Bad Stuff	7/2/2022
Existing Customer - Upgrade	External Referral	Closed Won	Chicago	Grand Hotels Generator Installations	\$350,000.00	Good Stuff	8/2/2022
Existing Customer - Upgrade	External Referral	Closed Won	Chicago	Grand Hotels SLA	\$90,000.00	Good Stuff	5/13/2022
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Installations	\$235,000.00	Good Stuff	6/27/2022
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Emergency Generators	\$440,000.00	Good Stuff	6/9/2022
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Standby Generators	\$120,000.00	Good Stuff	8/12/2022
Existing Customer - Upgrade	-	Needs Analysis	New York	United Oil Plant Standby Generators	\$675,000.00	Good Stuff	7/14/2022
New Customer	External Referral	Closed Won	Chicago	Grand Hotels Emergency Generators	\$210,000.00	Bad Stuff	7/31/2022
-	Phone Inquiry	Prospecting	Paris	Pyramid Emergency Generators	\$100,000.00	-	6/28/2022
New Customer	Trade Show	Closed Won	Portland	Express Logistics Standby Generator	\$220,000.00	Bad Stuff	5/16/2022
Existing Customer - Upgrade	Public Relations	Closed Won	Tucson	University of AZ SLA	\$60,000.00	Good Stuff	5/24/2022


Clickable Links

The Data View clickable links for any columns that include a record Id (e.g. Opportunity Name in the column above). This includes record names, master-detail, and lookup fields. When you click the link, Salesforce will open the referenced record in a new tab.

Adjusting Views

You can adjust the view using the buttons in the upper right corner, next to the “Rerun Report With Selected Filters” button

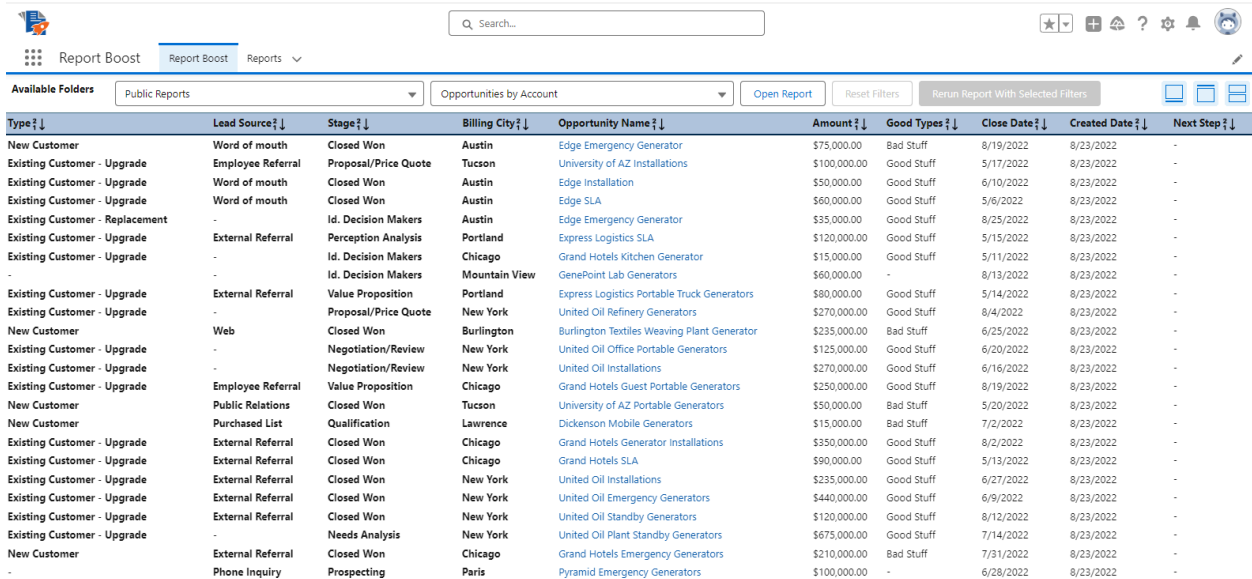


The first button  expands the Summary View, and collapses the Data View


The screenshot shows a Salesforce report titled "Opportunities by Account". The report is displayed in a single-pane view. The table contains the following data:

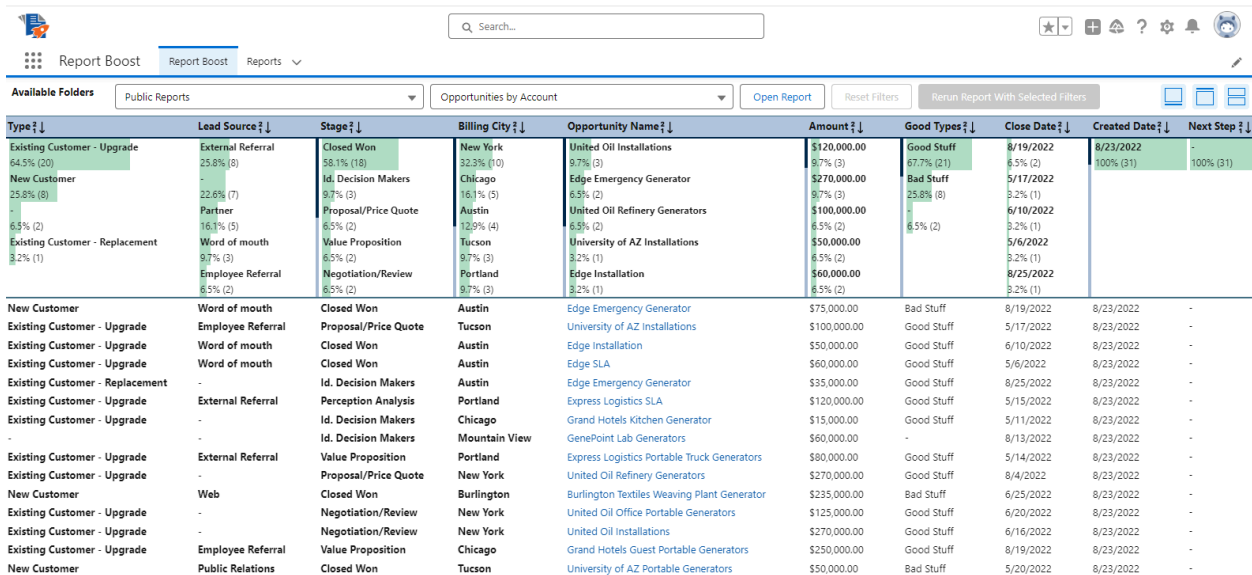
Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types	Close Date	Created Date	Next Step
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Installations	\$120,000.00	Good Stuff	8/19/2022	8/23/2022	-
64.5% (20)	25.8% (8)	58.1% (18)	32.3% (10)	9.7% (3)	9.7% (3)	67.7% (21)	6.5% (2)	100% (31)	100% (31)
New Customer	-	Id. Decision Makers	Chicago	Edge Emergency Generator	\$270,000.00	Bad Stuff	5/17/2022	-	-
25.8% (8)	22.6% (7)	9.7% (3)	16.1% (5)	6.5% (2)	9.7% (3)	25.8% (8)	3.2% (1)	-	-
-	Partner	Proposal/Price Quote	Austin	United Oil Refinery Generators	\$100,000.00	-	6/10/2022	-	-
6.5% (2)	16.1% (5)	6.5% (2)	12.9% (4)	6.5% (2)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
Existing Customer - Replacement	Word of mouth	Value Proposition	Tucson	University of AZ Installations	\$50,000.00	-	5/6/2022	-	-
3.2% (1)	9.7% (3)	6.5% (2)	9.7% (3)	3.2% (1)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
-	Employee Referral	Negotiation/Review	Portland	Edge Installation	\$60,000.00	-	8/25/2022	-	-
-	6.5% (2)	6.5% (2)	9.7% (3)	3.2% (1)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
-	Public Relations	Perception Analysis	Mountain View	Edge SLA	\$15,000.00	-	5/15/2022	-	-
-	6.5% (2)	3.2% (1)	9.7% (3)	3.2% (1)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
-	Web	Qualification	Burlington	Express Logistics SLA	\$235,000.00	-	5/11/2022	-	-
-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
-	Purchased List	Needs Analysis	Lawrence	Grand Hotels Kitchen Generator	\$90,000.00	-	8/13/2022	-	-
-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	6.5% (2)	6.5% (2)	3.2% (1)	-	-
-	Phone Inquiry	Prospecting	Paris	GenePoint Lab Generators	\$75,000.00	-	5/14/2022	-	-
-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	-	-
-	Trade Show	-	-	Express Logistics Portable Truck Generators	\$35,000.00	-	8/4/2022	-	-
-	3.2% (1)	-	-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	-	-
-	-	-	-	Burlington Textiles Weaving Plant Generator	\$80,000.00	-	6/25/2022	-	-
-	-	-	-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	-	-
-	-	-	-	United Oil Office Portable Generators	\$125,000.00	-	6/20/2022	-	-
-	-	-	-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	-	-
-	-	-	-	Grand Hotels Guest Portable Generators	\$250,000.00	-	6/16/2022	-	-
-	-	-	-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	-	-
-	-	-	-	University of AZ Portable Generators	\$350,000.00	-	5/20/2022	-	-
-	-	-	-	3.2% (1)	3.2% (1)	3.2% (1)	3.2% (1)	-	-

The second button  expands the Data View and collapses the Summary View



Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types	Close Date	Created Date	Next Step
New Customer	Word of mouth	Closed Won	Austin	Edge Emergency Generator	\$75,000.00	Bad Stuff	8/19/2022	8/23/2022	-
Existing Customer - Upgrade	Employee Referral	Proposal/Price Quote	Tucson	University of AZ Installations	\$100,000.00	Good Stuff	5/17/2022	8/23/2022	-
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge Installation	\$50,000.00	Good Stuff	6/10/2022	8/23/2022	-
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge SLA	\$60,000.00	Good Stuff	5/6/2022	8/23/2022	-
Existing Customer - Replacement	-	Id. Decision Makers	Austin	Edge Emergency Generator	\$35,000.00	Good Stuff	8/25/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Perception Analysis	Portland	Express Logistics SLA	\$120,000.00	Good Stuff	5/15/2022	8/23/2022	-
Existing Customer - Upgrade	-	Id. Decision Makers	Chicago	Grand Hotels Kitchen Generator	\$15,000.00	Good Stuff	5/11/2022	8/23/2022	-
-	-	Id. Decision Makers	Mountain View	GenePoint Lab Generators	\$60,000.00	-	8/13/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Value Proposition	Portland	Express Logistics Portable Truck Generators	\$80,000.00	Good Stuff	5/14/2022	8/23/2022	-
Existing Customer - Upgrade	-	Proposal/Price Quote	New York	United Oil Refinery Generators	\$270,000.00	Good Stuff	8/4/2022	8/23/2022	-
New Customer	Web	Closed Won	Burlington	Burlington Textiles Weaving Plant Generator	\$235,000.00	Bad Stuff	6/25/2022	8/23/2022	-
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Office Portable Generators	\$125,000.00	Good Stuff	6/20/2022	8/23/2022	-
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Installations	\$270,000.00	Good Stuff	6/16/2022	8/23/2022	-
Existing Customer - Upgrade	Employee Referral	Value Proposition	Chicago	Grand Hotels Guest Portable Generators	\$250,000.00	Good Stuff	8/19/2022	8/23/2022	-
New Customer	Public Relations	Closed Won	Tucson	University of AZ Portable Generators	\$50,000.00	Bad Stuff	5/20/2022	8/23/2022	-
New Customer	Purchased List	Qualification	Lawrence	Dickenson Mobile Generators	\$15,000.00	Bad Stuff	7/2/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Closed Won	Chicago	Grand Hotels Generator installations	\$350,000.00	Good Stuff	8/2/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Closed Won	Chicago	Grand Hotels SLA	\$90,000.00	Good Stuff	5/13/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil installations	\$235,000.00	Good Stuff	6/27/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Emergency Generators	\$440,000.00	Good Stuff	6/9/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Standby Generators	\$120,000.00	Good Stuff	8/12/2022	8/23/2022	-
Existing Customer - Upgrade	-	Needs Analysis	New York	United Oil Plant Standby Generators	\$675,000.00	Good Stuff	7/14/2022	8/23/2022	-
New Customer	External Referral	Closed Won	Chicago	Grand Hotels Emergency Generators	\$210,000.00	Bad Stuff	7/31/2022	8/23/2022	-
-	Phone Inquiry	Prospecting	Paris	Pyramid Emergency Generators	\$100,000.00	-	6/28/2022	8/23/2022	-

The third button  sets the screen back to the default where both the Summary and Data Views are visible



Type	Lead Source	Stage	Billing City	Opportunity Name	Amount	Good Types	Close Date	Created Date	Next Step
Existing Customer - Upgrade	External Referral	Closed Won	New York	United Oil Installations	\$120,000.00	Good Stuff	8/19/2022	8/23/2022	-
64.5% (20)	25.8% (8)	58.1% (18)	32.3% (10)	9.7% (3)	\$75,000.00	67.7% (21)	6.5% (2)	100% (31)	100% (31)
New Customer	-	Id. Decision Makers	Chicago	Edge Emergency Generator	\$270,000.00	Bad Stuff	5/17/2022	-	-
25.8% (8)	-	9.7% (3)	16.1% (5)	6.5% (2)	\$270,000.00	25.8% (8)	3.2% (1)	-	-
-	Partner	Proposal/Price Quote	Austin	United Oil Refinery Generators	\$100,000.00	-	6/10/2022	-	-
6.5% (2)	16.1% (5)	6.5% (2)	12.9% (4)	6.5% (2)	\$100,000.00	6.5% (2)	3.2% (1)	-	-
Existing Customer - Replacement	Word of mouth	Value Proposition	Tucson	University of AZ Installations	\$50,000.00	-	5/6/2022	-	-
3.2% (1)	9.7% (3)	6.5% (2)	9.7% (3)	3.2% (1)	\$50,000.00	3.2% (1)	3.2% (1)	-	-
-	Employee Referral	Negotiation/Review	Portland	Edge Installation	\$60,000.00	-	8/25/2022	-	-
-	6.5% (2)	6.5% (2)	9.7% (3)	3.2% (1)	\$60,000.00	3.2% (1)	3.2% (1)	-	-
New Customer	Word of mouth	Closed Won	Austin	Edge Emergency Generator	\$75,000.00	Bad Stuff	8/19/2022	8/23/2022	-
Existing Customer - Upgrade	Employee Referral	Proposal/Price Quote	Tucson	University of AZ Installations	\$100,000.00	Good Stuff	5/17/2022	8/23/2022	-
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge Installation	\$50,000.00	Good Stuff	6/10/2022	8/23/2022	-
Existing Customer - Upgrade	Word of mouth	Closed Won	Austin	Edge SLA	\$60,000.00	Good Stuff	5/6/2022	8/23/2022	-
Existing Customer - Replacement	-	Id. Decision Makers	Austin	Edge Emergency Generator	\$35,000.00	Good Stuff	8/25/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Perception Analysis	Portland	Express Logistics SLA	\$120,000.00	Good Stuff	5/15/2022	8/23/2022	-
Existing Customer - Upgrade	-	Id. Decision Makers	Chicago	Grand Hotels Kitchen Generator	\$15,000.00	Good Stuff	5/11/2022	8/23/2022	-
-	-	Id. Decision Makers	Mountain View	GenePoint Lab Generators	\$60,000.00	-	8/13/2022	8/23/2022	-
Existing Customer - Upgrade	External Referral	Value Proposition	Portland	Express Logistics Portable Truck Generators	\$80,000.00	Good Stuff	5/14/2022	8/23/2022	-
Existing Customer - Upgrade	-	Proposal/Price Quote	New York	United Oil Refinery Generators	\$270,000.00	Good Stuff	8/4/2022	8/23/2022	-
New Customer	Web	Closed Won	Burlington	Burlington Textiles Weaving Plant Generator	\$235,000.00	Bad Stuff	6/25/2022	8/23/2022	-
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Office Portable Generators	\$125,000.00	Good Stuff	6/20/2022	8/23/2022	-
Existing Customer - Upgrade	-	Negotiation/Review	New York	United Oil Installations	\$270,000.00	Good Stuff	6/16/2022	8/23/2022	-
Existing Customer - Upgrade	Employee Referral	Value Proposition	Chicago	Grand Hotels Guest Portable Generators	\$250,000.00	Good Stuff	8/19/2022	8/23/2022	-
New Customer	Public Relations	Closed Won	Tucson	University of AZ Portable Generators	\$50,000.00	Bad Stuff	5/20/2022	8/23/2022	-

Additional Support

- For additional support, please visit openwacca.com/rbsupport or email rbsupport@openwacca.com