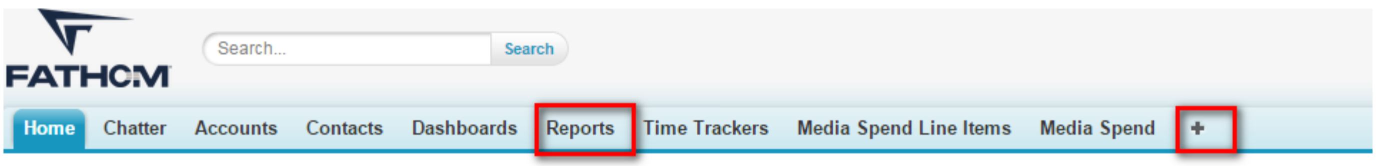
How To: Pull a Report & Export Data

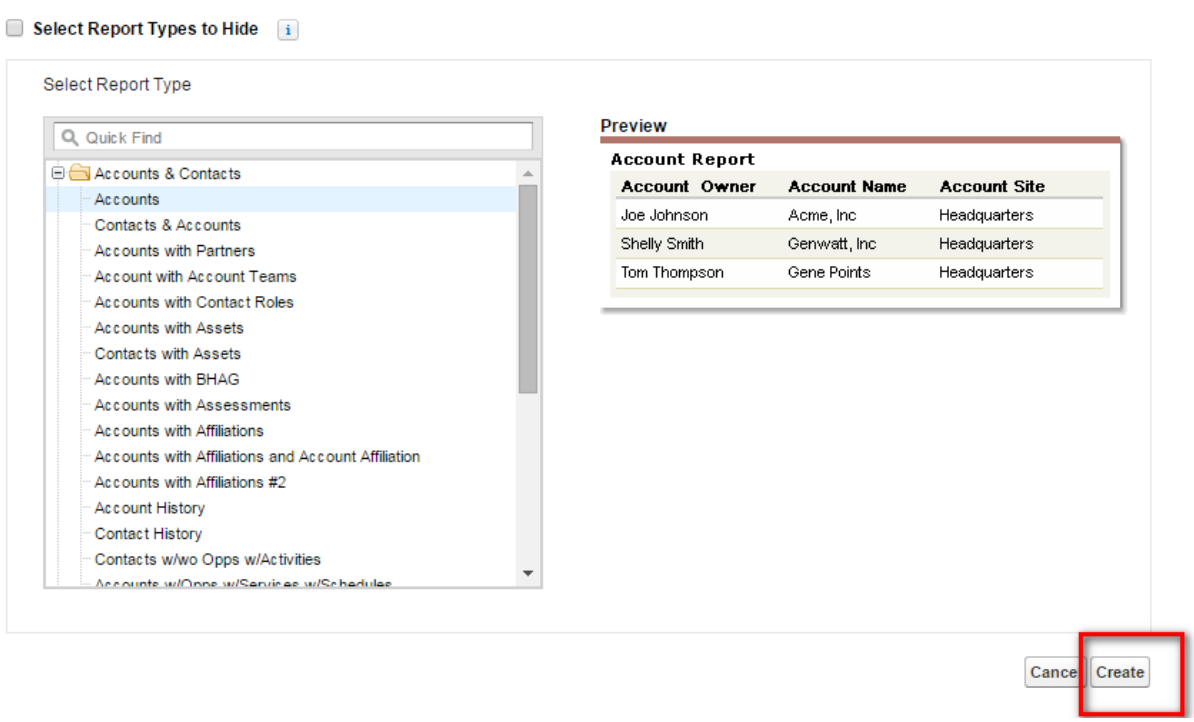
One of the most common requests a system administrator will receive from sales reps is "can you pull me a report?" Sales reps are often not aware that if you have a full license to Salesforce, you are able to pull the majority of the reports you wish to see on your own, all you have to do is learn how. Being able to pull a report yourself instead of tracking down an administrator and waiting until they have time to help you will save sales reps time and make them more efficient. To learn how to pull your own report, follow the simple steps outlined below:

To begin pulling a report, click the reports tab located on the blue bar at the top of the screen. If you do not see "reports" listen on the blue tab, click the "+" button at the end and scroll through the list of objects to find "reports."

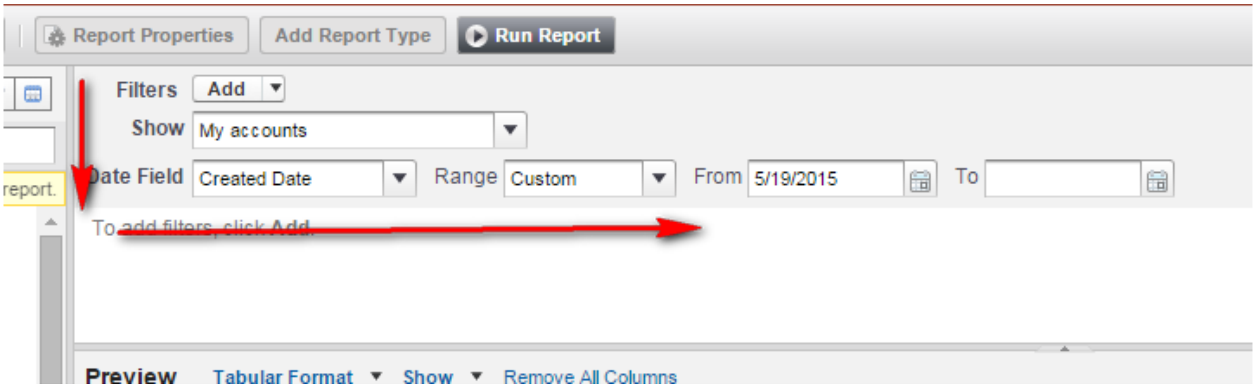


Next, click "New Report" and then choose the report type you wish to pull. Be sure to evaluate all possible report types when pulling a report. The most common issue with people not being able to get the right information from a report is because they have pulled the wrong report type.

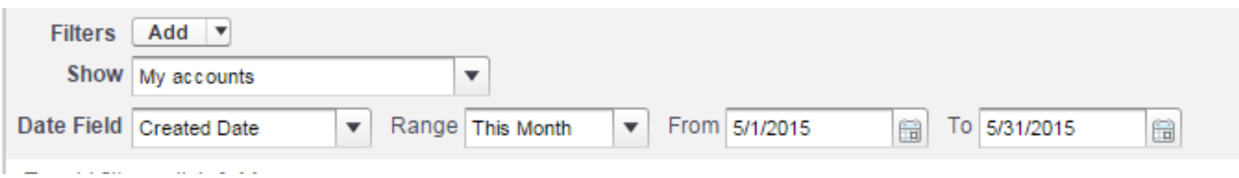
Once you choose the report type, click "Create" in the bottom right corner:



To begin pulling your criteria, start at the top of the screen and work your way down. And to the left.

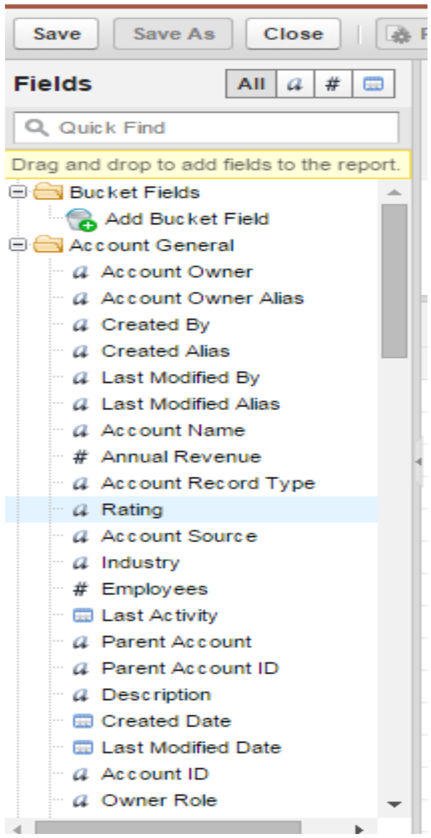


Using the fields shown above, you can limit the amount of information you will see on the report. For example, if you wanted to pull a report that showed all accounts owned by you created this month the criteria would look like this:

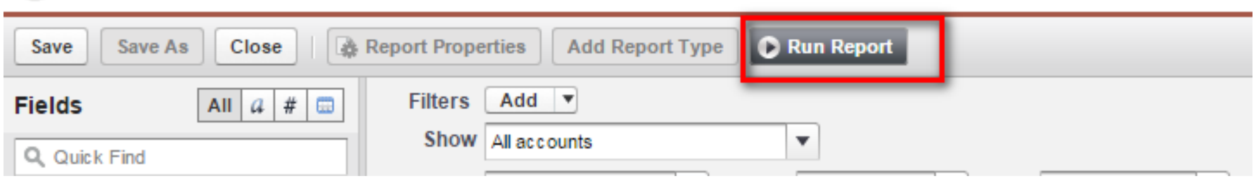


To narrow down the report even more, you can click the “Add” button next to “Filters shown on the top left of the screenshot above.

Located on the left of the report builder, you should see a column (similar to the one below) that shows all the possible fields you can add to your report. To add any of these fields, just double click on the field name you wish to add.

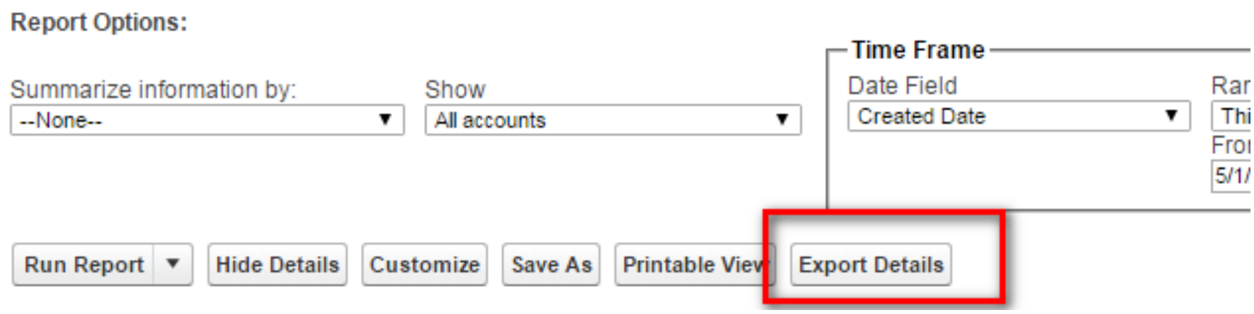


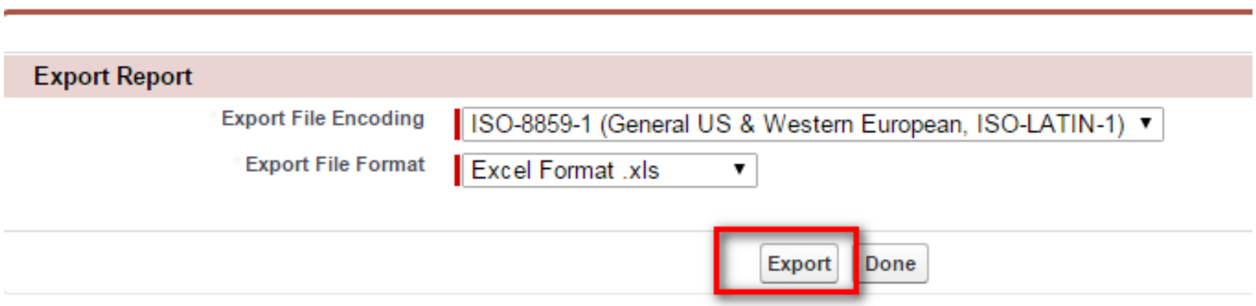
Once you have added all the fields you wish to see, click the "Run Report" button at the top of the screen.



Once you click "Run Report" you will be able to see the full list of record that are displayed in the report. (NOTE: when building the report in the previous window you are only able to see a "preview" of the report, it will not show the full results until you click "run report" as shown above.)

To export the full report to an excel doc, simply click "Export Details" shown in the screenshot below and then choose the correct file format, and click "Export."


Report Options:
Summarize information by:
--None--
Show
All accounts
Time Frame
Date Field
Created Date
Run Report
Hide Details
Customize
Save As
Export Details


Export Report
Export File Encoding
ISO-8859-1 (General US & Western European, ISO-LATIN-1)
Export File Format
Excel Format .xls
Export
Done