

Using Parameters to enhance your scheduled reports in the Report Scheduler.

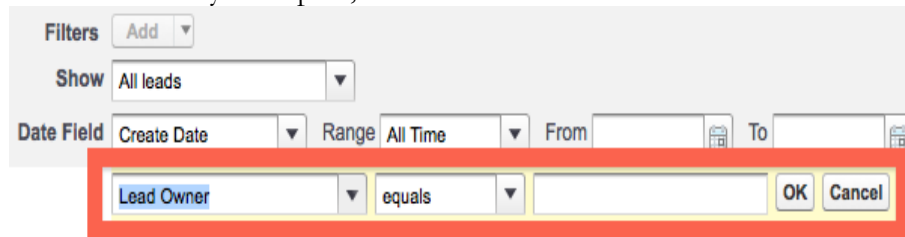
Just as an example: Lets say you want to create a “Neglected Leads” report that you can distribute to your 8 Area Directors every Monday morning. Rather than having to clone 1 report 8 times, then schedule or manually forward those reports, you can now create just one report, then use report scheduler to deliver that 1 report in the Context of what each of the 8 Area Director needs to see. We would produce 7 schedules of that 1 report. Going, if the values or columns needed to be modified in the report, you’re only making a change to 1 report, and nothing has to change in the Report Scheduler.

In the example below, I’m going to use a parameter value (PV) to dynamically insert my filter value for Lead Owner. In this example, I’ve only used 1 filter in my report, but I could just as easily had 3 or 4 or 5 filters. When passing parameters the first parameter value you pass is represented as pv0, the second parameter value would be pv1, then pv2, etc ....

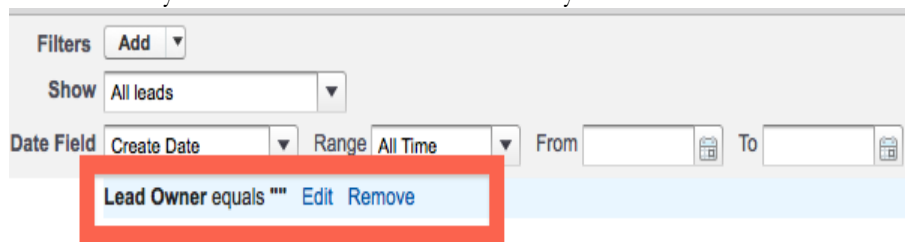
So first lets create the custom report.

Create a Custom Report for Leads, and include “Lead Owner” as one of the columns.

Add a “Filter to your report, but leave the value blank. Click on OK.



This is what your filter should look like after you click on “OK”.



Save the Report to your new “Filtered Reports” folder after you finished selecting the formatting and all of the columns that you’d like to display.

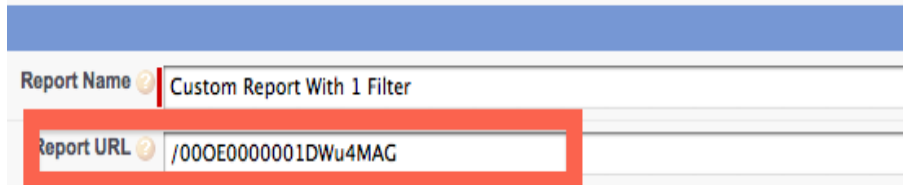
Next go to Report Scheduler and click on New Scheduled Report.

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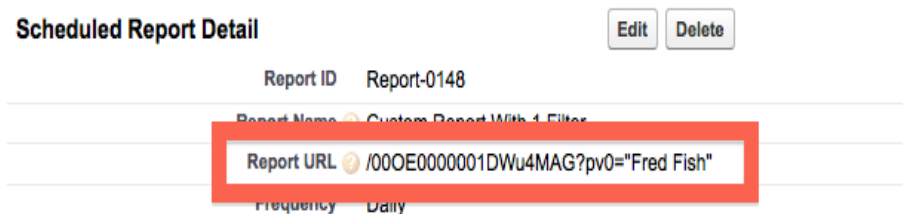
In the Report Folder tree, navigate to the Filtered Reports folder, find your new Leads Report, and click on that report.

This is what you should see.



A screenshot of a report configuration form. The form has a blue header bar. Below it, there are two input fields. The first field is labeled "Report Name" and contains the text "Custom Report With 1 Filter". The second field is labeled "Report URL" and contains the text "/000E0000001DWu4MAG". The "Report URL" field is highlighted with a red rectangular border.

Look at this next image and compare the highlighted values in it to the image above this one. Do you see new data that I manually added to the end of the URL (after 4MAG), starting with the question mark. `?pv0="Fred Fish"` This is how I can pass the value Fred Fish to the filter of that Report as the Lead Owner. So when this report is distributed every Monday, the data will ONLY reflect Leads owned by Fred Fish. If I had 7 other names of Reps to filter, I would create 1 new scheduled report, passing one of each of those names as a parameter to that URL.



A screenshot of a "Scheduled Report Detail" table. The table has a header row with "Report ID" and "Report-0148". Below the header, there are two rows of data. The first row shows "Report Name" as "Custom Report With 1 Filter". The second row shows "Report URL" as "/000E0000001DWu4MAG?pv0=\"Fred Fish\"". The "Report URL" cell is highlighted with a red rectangular border. To the right of the table, there are "Edit" and "Delete" buttons.

Let us know if you're interested in getting some help with more complex filtering and passing multiple parameters.

Give us your feedback and let us know if this was helpful.

Regards,

CRMGuidance Support