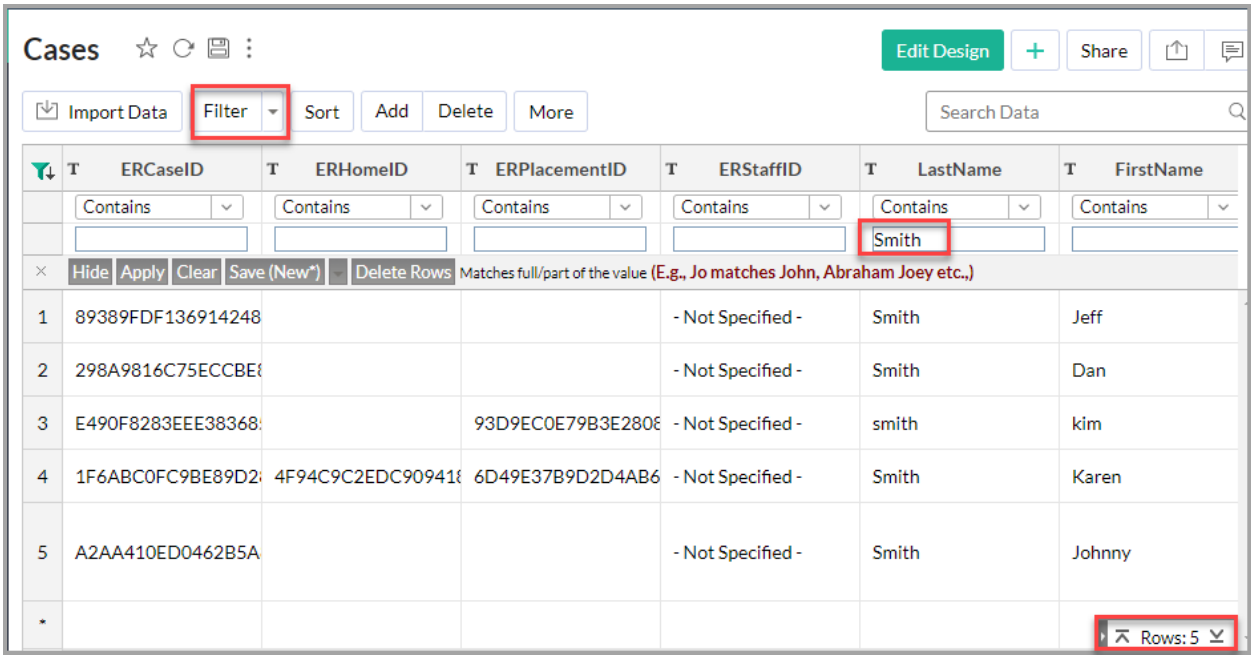
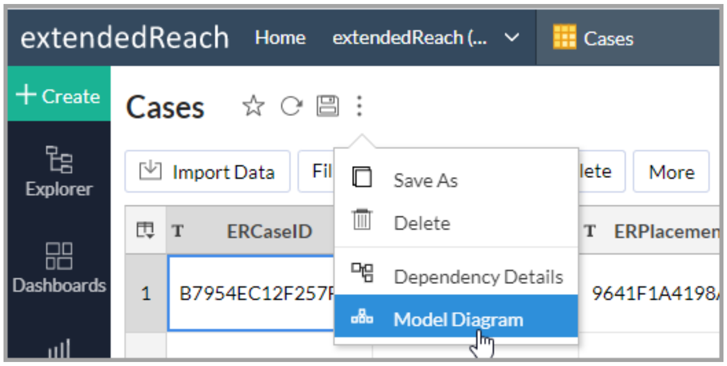
Zoho Tips & Tricks

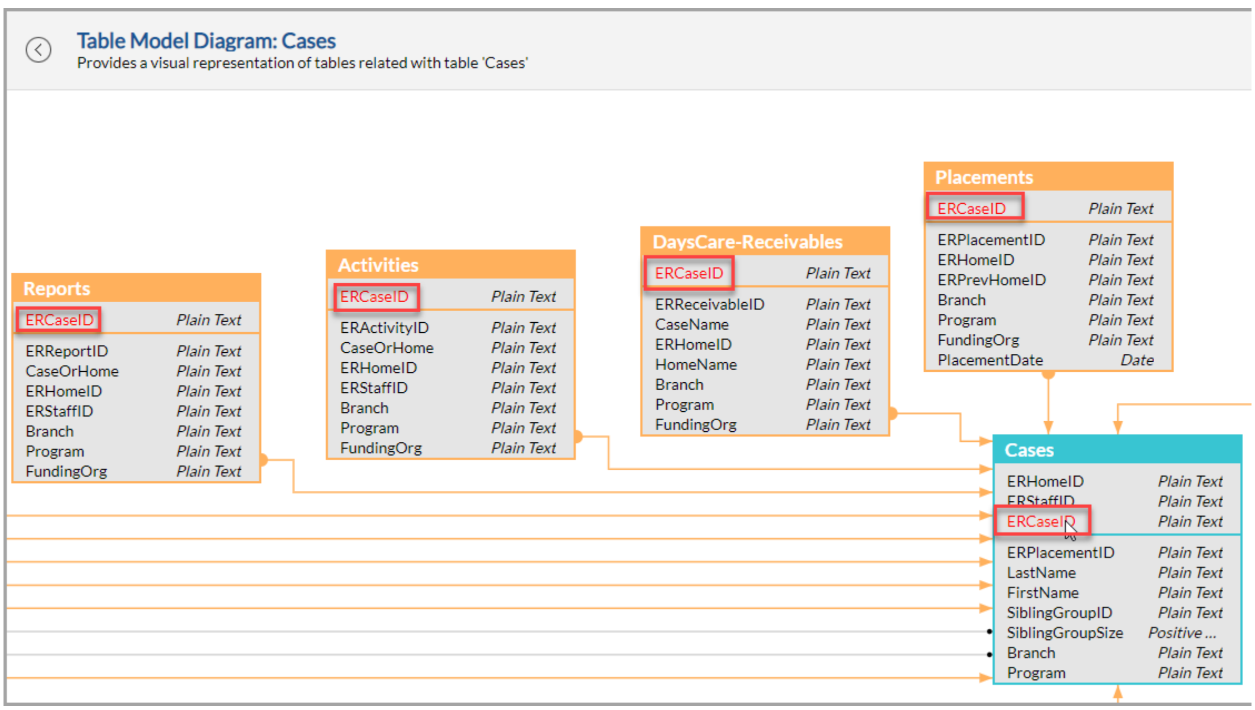
1. Review your extendedReach data in **Data** tables
   a. You can filter data using the **Filter tool** (for example, show me all my Cases where the LastName contains "Smith")
   b. View the **total number of records** (e.g. 5, below) in the bottom right corner of any data table



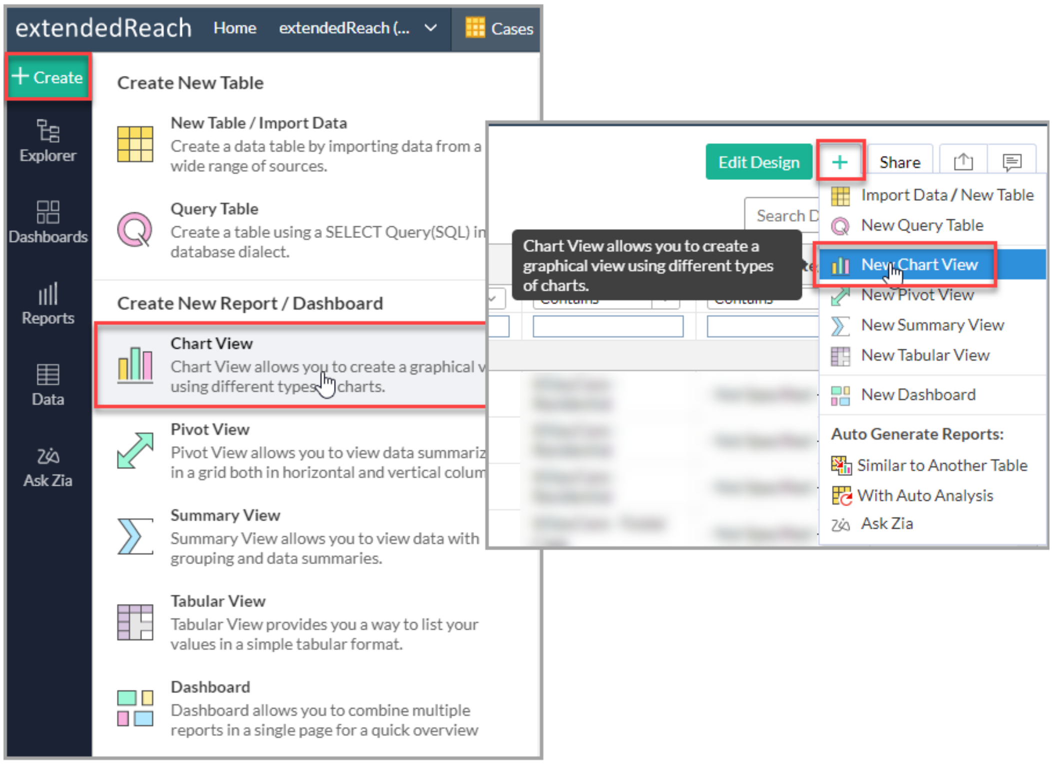
2. **Links** between tables (e.g., Cases and Activities)
    a. Access the **Model Diagram** for the table



    b. Tables from extendedReach are already **Linked** by the fields highlighted in red (e.g., eRCaseID for Cases<>Placements or Cases<>Activities or Reports)



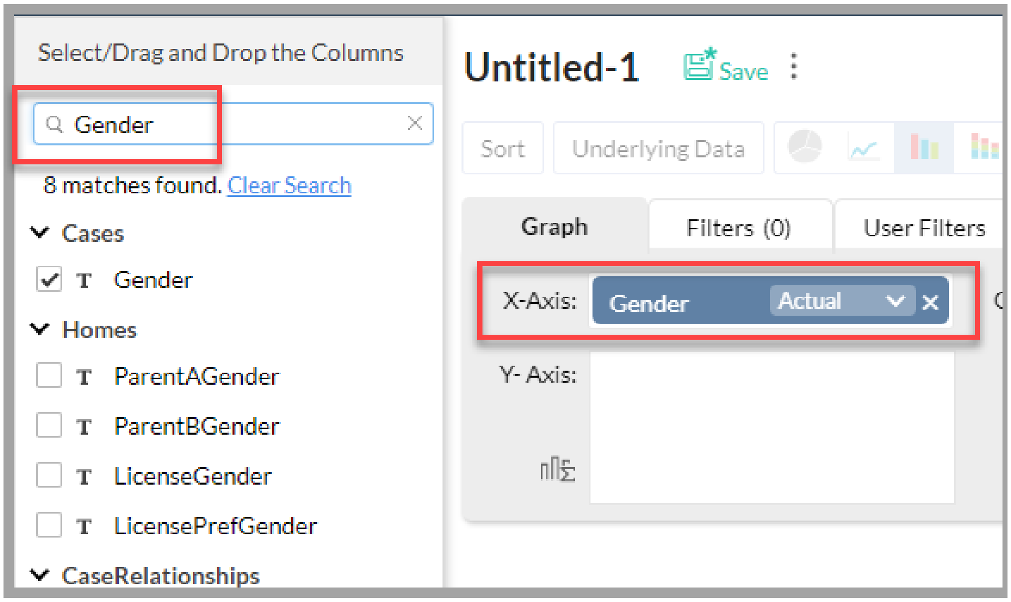
3. **Building** a simple report
    a. Decide which **type of report** you want (e.g., graph/chart, pivot table?)
    b. You can create a new report by clicking 'Create' on the left side menu or by clicking the green '+' on the top right of the screen when you're already viewing a Data table.



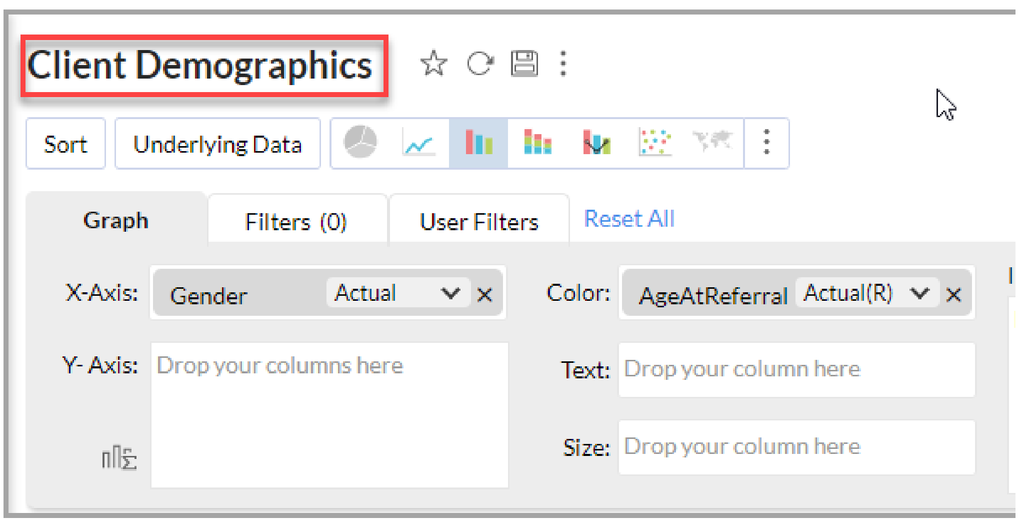
    c. Decide what your **base table** will be (e.g., Cases if you are creating a report about individual clients; Activities or Reports if you are creating a report about a particular Activity or Report in extendedReach)

d. Drag a few columns into the report builder interface

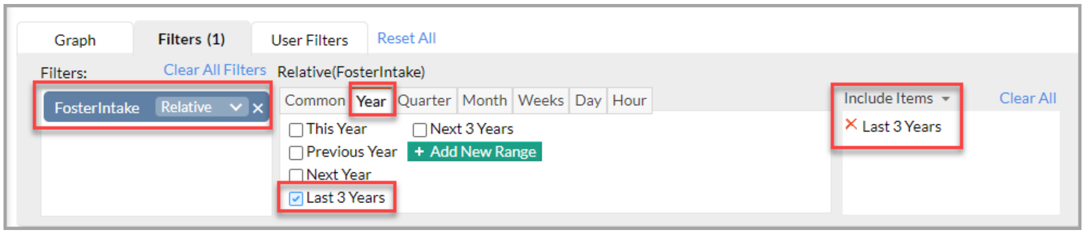
i. **Search** for a column



ii. **Name** the report

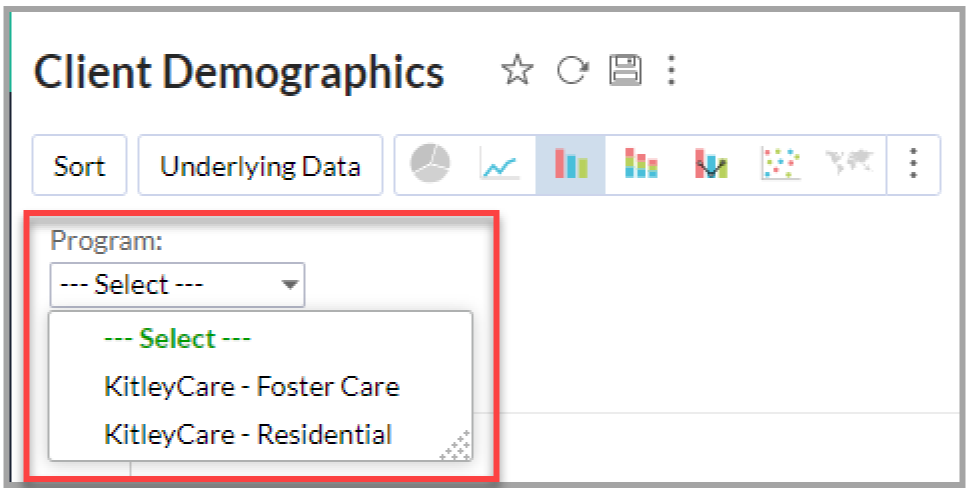


4. **Filters vs User Filters**
   a. **Filter**: always in use and end users can't change this



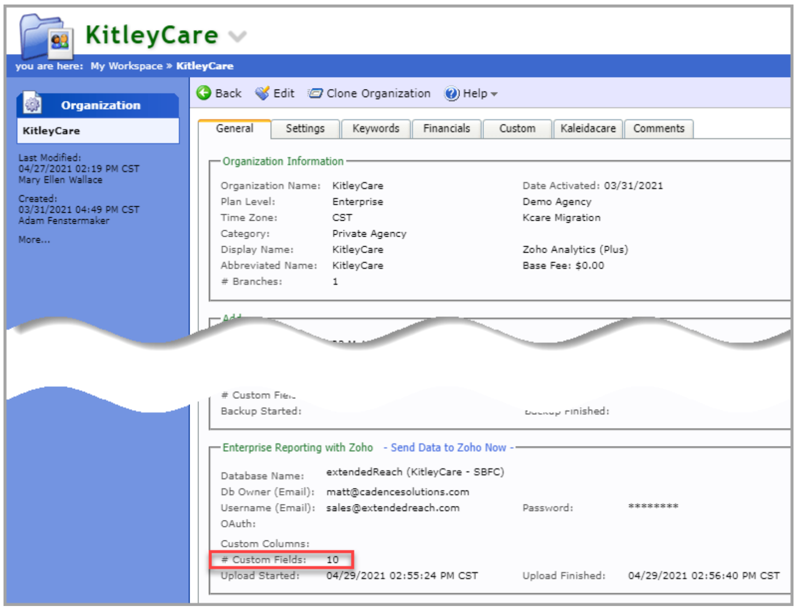
Ex: If you only ever want to pull in Cases where the FosterIntake date was in the last 3 years

   b. **User filter**: allows end users to change the filter as necessary

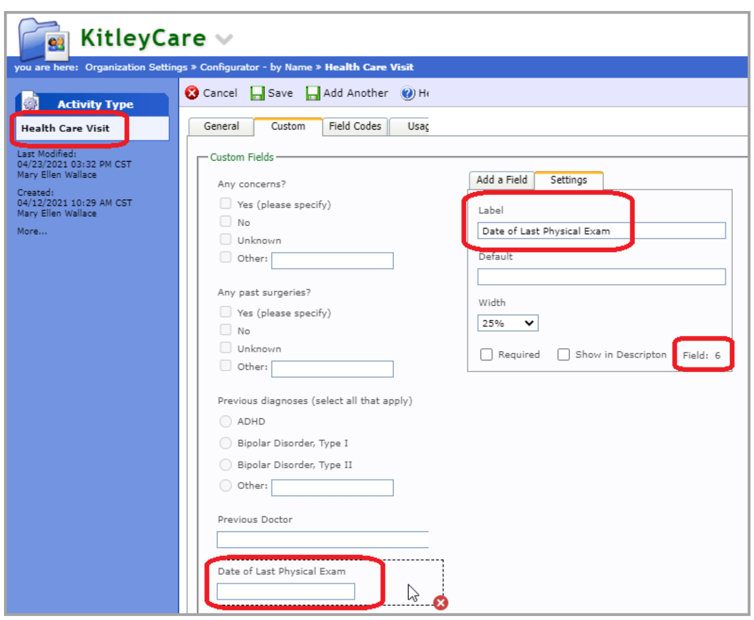


Ex: If you want to allow end users to select which program to view – some users will want to see Foster Care, and some will want to see Residential

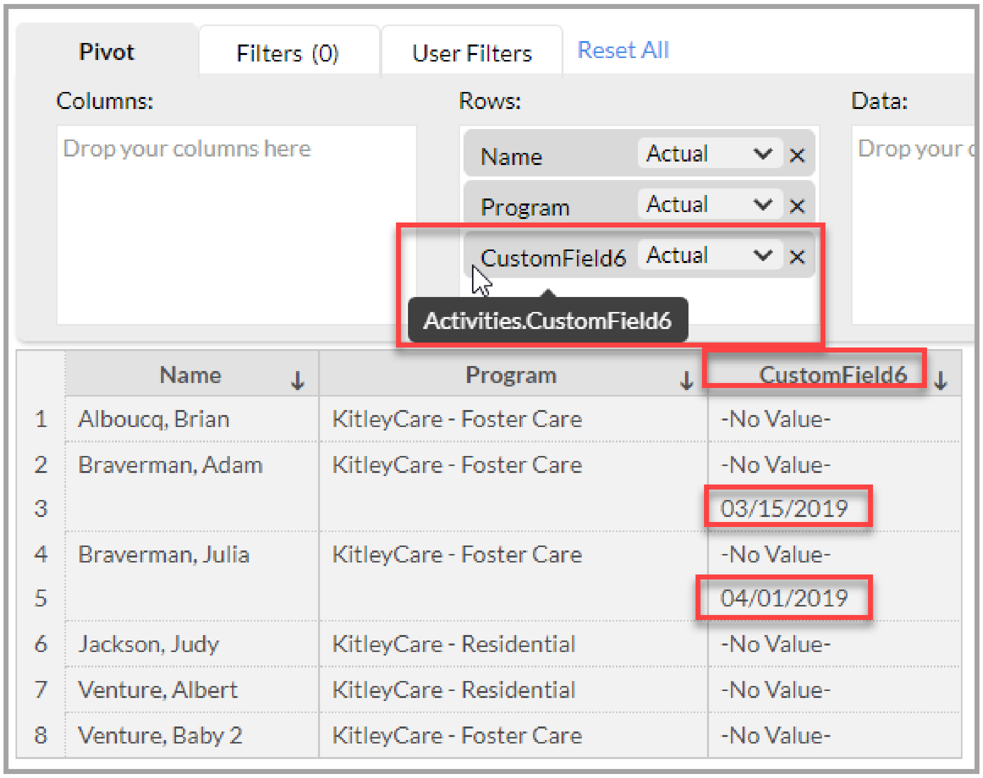
5. Using **Custom Columns** in your Zoho report
    a. Custom fields from extendedReach are included in your data tables in Zoho.
        i. By default, the **first 10 custom fields** are included in your Zoho data and you can set this limit in Organization Preferences (FC) or System Configuration (GCM). **Note**: The more custom columns you pull in, the longer it takes to sync your agency's data, so we recommend increasing this limit mindfully (by 10 at a time) so your data sync doesn't take too long.



        ii. Find the field number for the custom field you'd like to use in your report and pull in the corresponding CustomFieldX where the X corresponds to the field number.

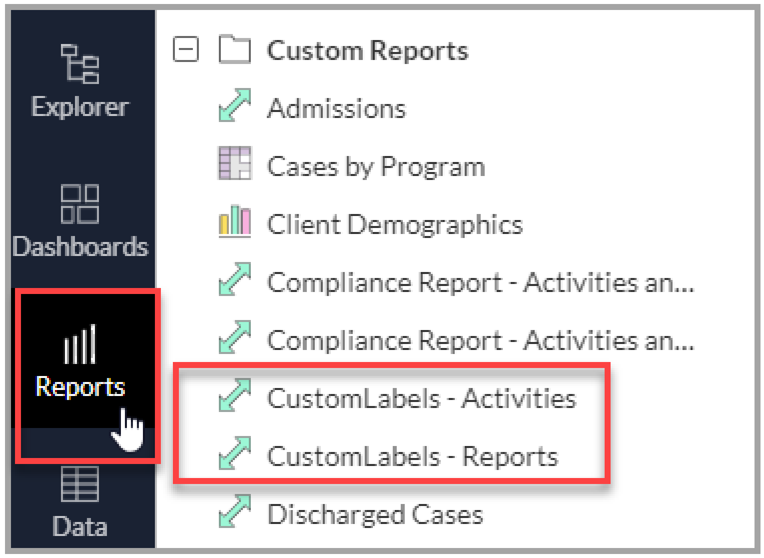


iii. For example, if I wanted to see the ‘Date of Last Physical Exam’ for clients in my Foster Care program, and I knew I collected those dates in my Health Care Visit Activity, I would find the custom field number for that field (in this case, 6) and pull in CustomField6 to my report.



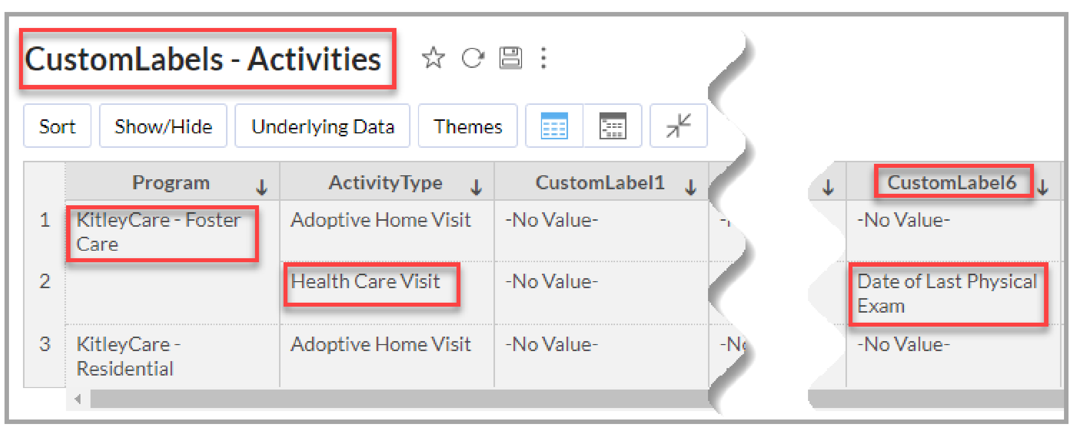
b. **CustomLabels reports for Activities and Reports**

i. We have created two reports* that should help you find the field numbers for custom fields without having to go back to the Configurator in extendedReach:



ii. These are organized by Program and Activity/Report Type, and they allow you to view all labels of custom columns and their corresponding field numbers for any Activity or Report type.

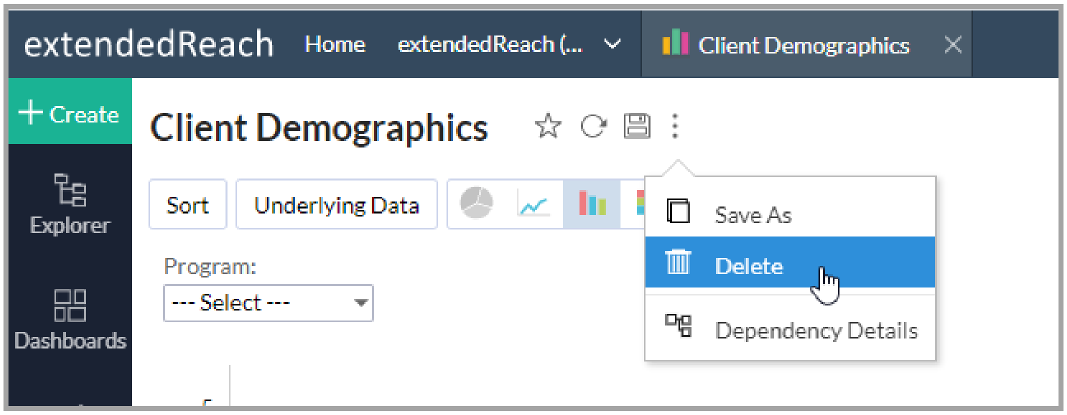
iii. For the example above, I'd look for the Health Care Visit Activity for the KitleyCare - Foster Care Program and find that Date of Last Physical Exam is CustomLabel6.



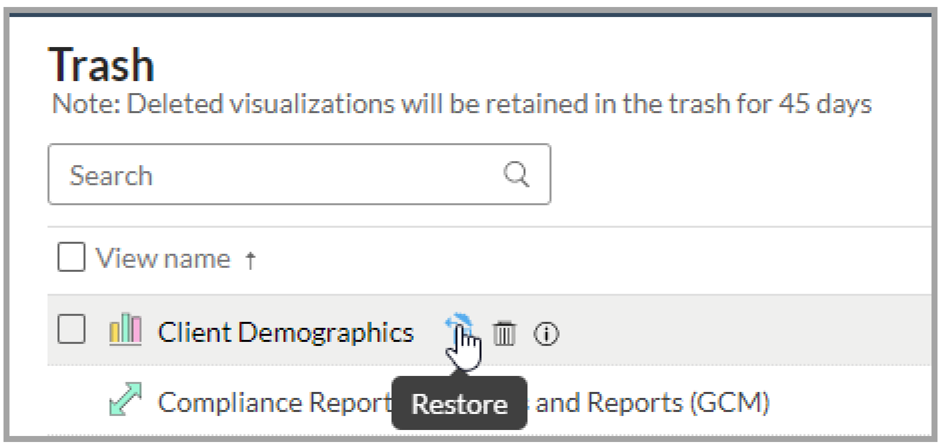
iv. **Note**: If custom fields are moved around within a form, their corresponding field numbers generally stay the same. However, if custom field labels change, you can use the CreatedDate on the right side of these reports to determine which contains the latest labels.

v. ***Note**: If you do not see these reports in your system, send a message to support@extendedreach.com and we can copy them over into your system.

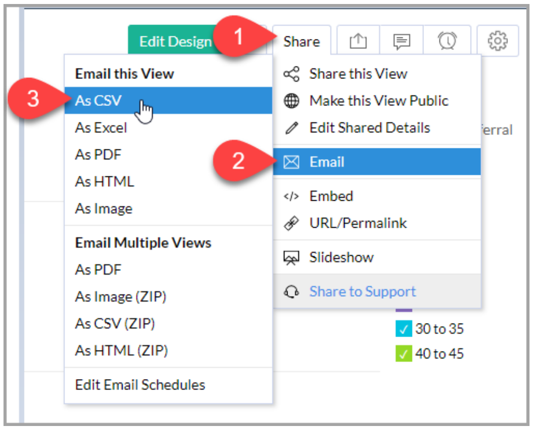
6. **Deleting** tables, reports, or dashboards
    a. You can delete items from Zoho by clicking on the three horizontal dots



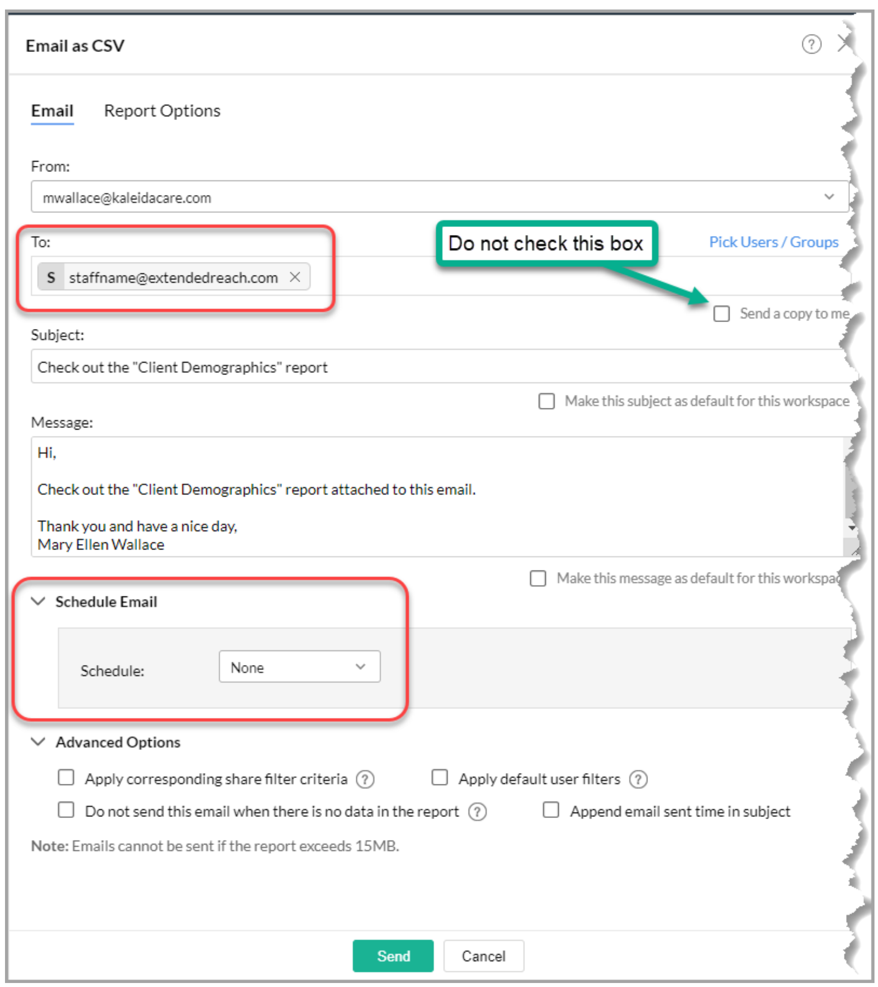
    b. When an item is deleted, it is recoverable for up to 45 days in the 'Trash' located at the bottom of the left sidebar.



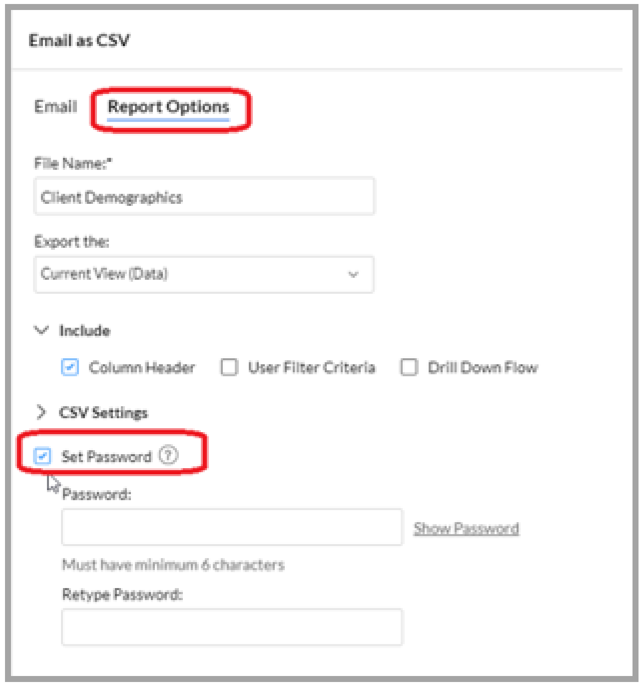
7. Emailing and Sharing Reports
    a. **Email** to a particular person or group
        i. Share > Email



        ii. Optional email settings
            1. Set a recurring **schedule**

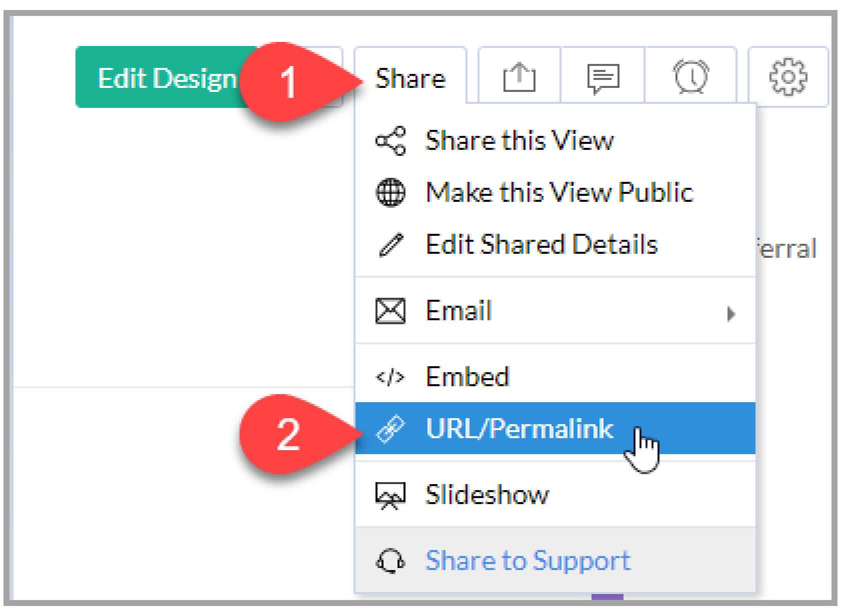


2. Set a **password**

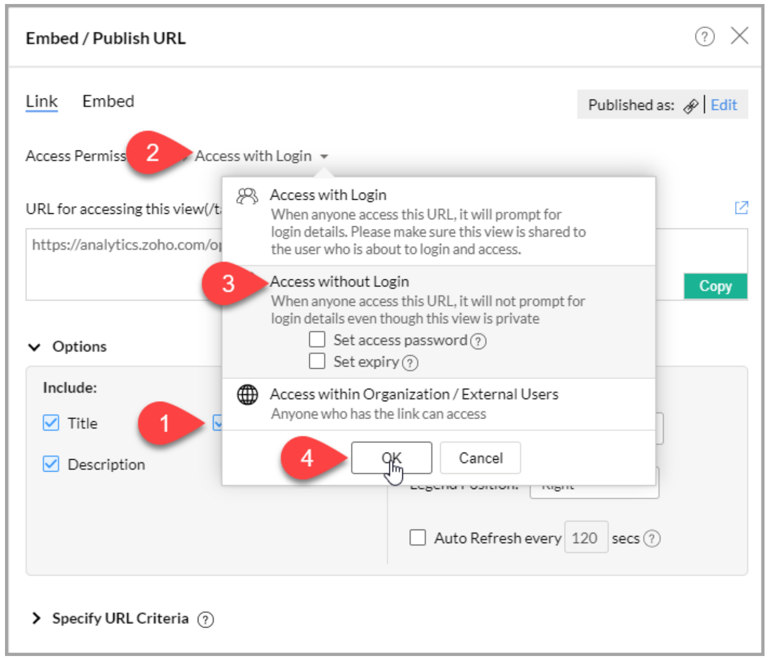


b. Make available in **extendedReach**

i. Share > **URL/Permalink**

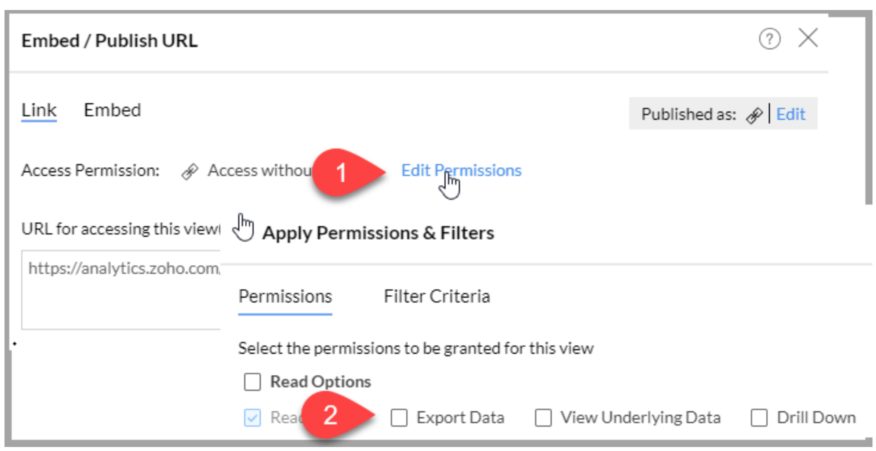


1. Include **Toolbar**
2. **Access without login**

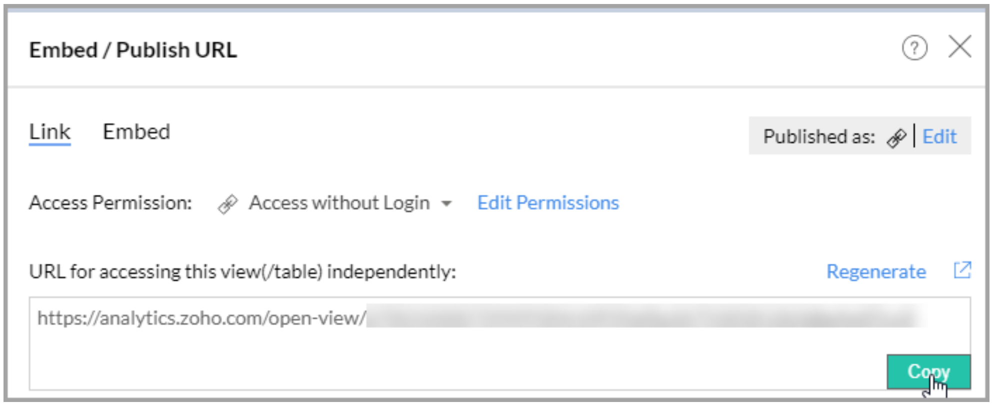


ii. Edit **Permissions**

1. Allow users to export data, view underlying data or drill down

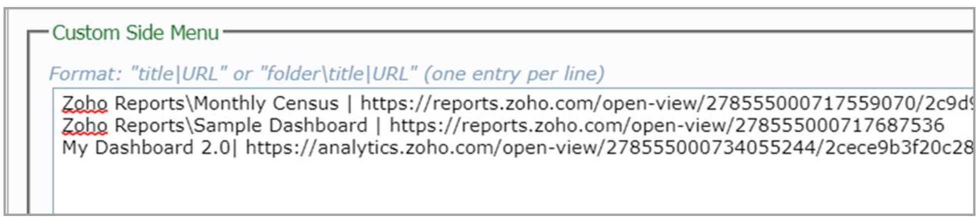


iii. **Copy the URL**

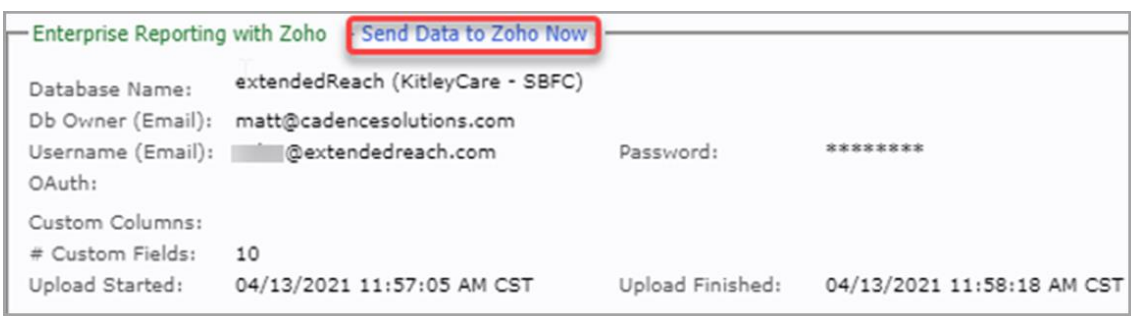


iv. **Paste the URL** into **Custom Side Menu** box in extendedReach

1. Org Preferences (FC) or System Configuration (GCM



8. **Manually syncing Zoho data** from extendedReach
   a. Org Preferences (FC) or System Configuration (GCM)
   b. General tab
   c. 'Enterprise Reporting with Zoho' section
   d. Click 'Send Data to Zoho now'



extendedReach powered by kcare

9. Thanks for all of this, but **I still need help**!
    a. Check out our **Help Center** through your extendedReach system for articles, FAQs, tips and tricks.
        i. **Overview**: https://erfostercare.helpscoutdocs.com/article/289-zoho-reports-overview
        ii. **Creating Charts Video**: https://erfostercare.helpscoutdocs.com/article/72-creating-charts-video
        iii. **Creating Pivot Tables**: https://erfostercare.helpscoutdocs.com/article/73-creating-pivot-tables-video
    b. If you have a question about how Zoho works, you'll get the best response by emailing support@zohoanalytics.com.
    c. If you still can't find an answer to your question, the extendedReach support team can be reached at support@extendedReach.com.
        i. Include as much detail as possible in your request
        ii. Examples of information that will expedite our investigation into the issue include:
            1. What do you need to do?
            2. What are you having trouble with?
            3. Is there a specific report you are having difficulties with?
                a. Name of the report
                b. Paste the URL from your browser
        iii. **Screenshots** to demonstrate your question are also very helpful.
        iv. How we can support you:
            1. We **CAN** help you troubleshoot issues you are having and provide general guidance on your Zoho questions, or we are happy to review a report or dashboard you have created to answer specific questions.
            2. We **CAN NOT** design, create, and build new reports and dashboards for you. If that is something you need, we do have a company that we can recommend to you that would be able to provide these services.