

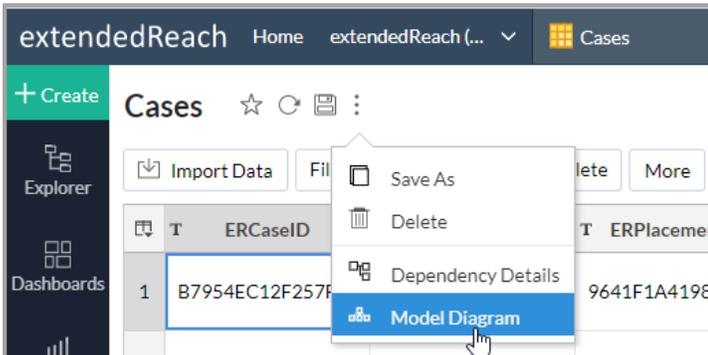
# Zoho Tips & Tricks

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

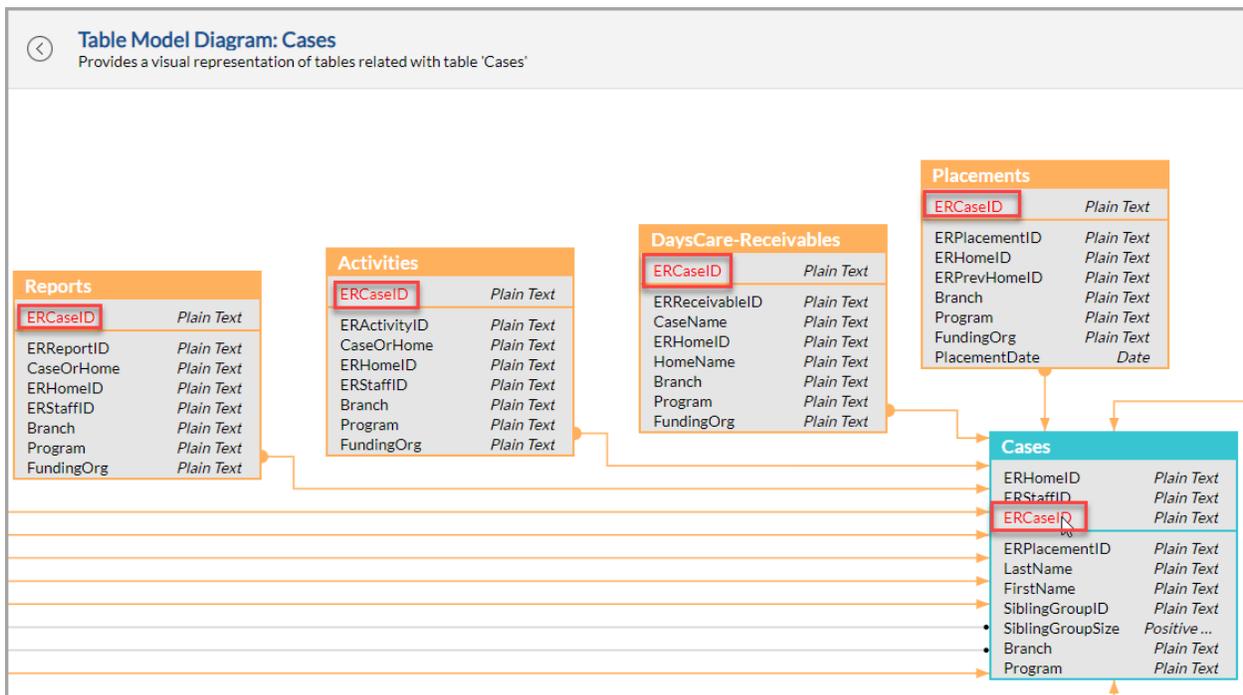
The screenshot displays the Zoho Data Studio interface for a table named 'Cases'. The table has columns for ERCaseID, ERHomeID, ERPlacementID, ERStaffID, LastName, and FirstName. A filter is applied to the LastName column, set to 'Contains' with the value 'Smith'. The table contains 5 rows of data. The 'Filter' button in the toolbar and the 'Smith' filter value are highlighted with red boxes. The bottom right corner of the table shows 'Rows: 5'.

T	ERCASEID	T	ERHOMEID	T	ERPLACEMENTID	T	ERSTAFFID	T	LASTNAME	T	FIRSTNAME
	Contains		Contains		Contains		Contains		Contains		Contains
									Smith		
× Hide Apply Clear Save (New*) Delete Rows Matches full/part of the value (E.g., Jo matches John, Abraham Joey etc.,)											
1	89389FDF136914248						- Not Specified -		Smith		Jeff
2	298A9816C75ECCBE8						- Not Specified -		Smith		Dan
3	E490F8283EEE38368				93D9EC0E79B3E280E		- Not Specified -		smith		kim
4	1F6ABC0FC9BE89D2	4F94C9C2EDC90941			6D49E37B9D2D4AB6		- Not Specified -		Smith		Karen
5	A2AA410ED0462B5A						- Not Specified -		Smith		Johnny
.											

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

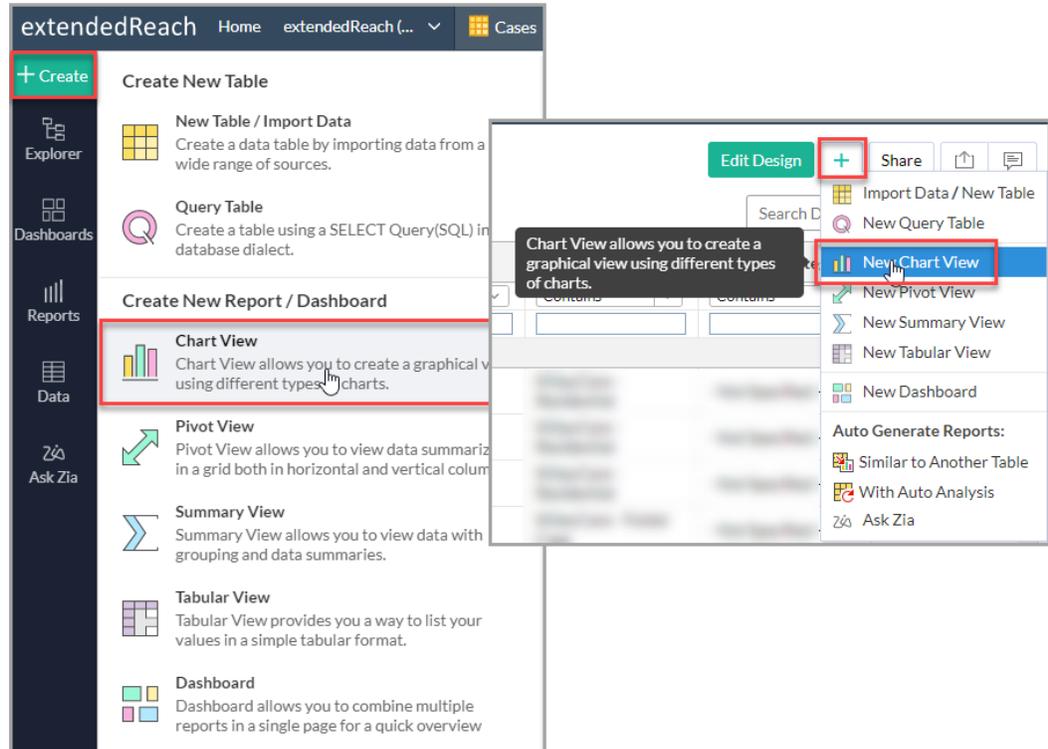


- b. Tables from extendedReach are already **Linked** by the fields highlighted in red (e.g., eRCasID for Cases<>Placements or Cases<>Activities or Reports)



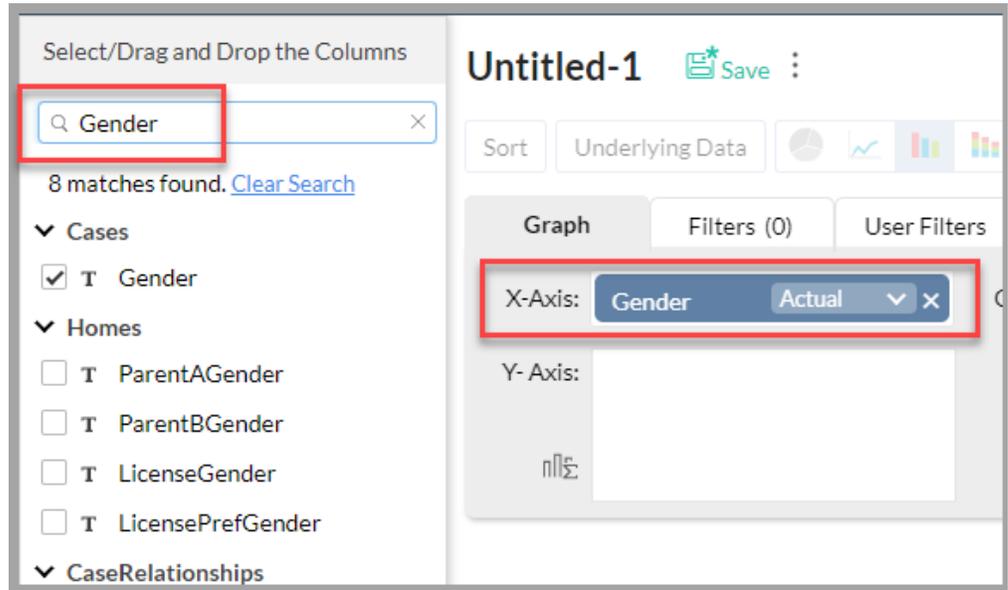
### 3. Building a simple report

- 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.

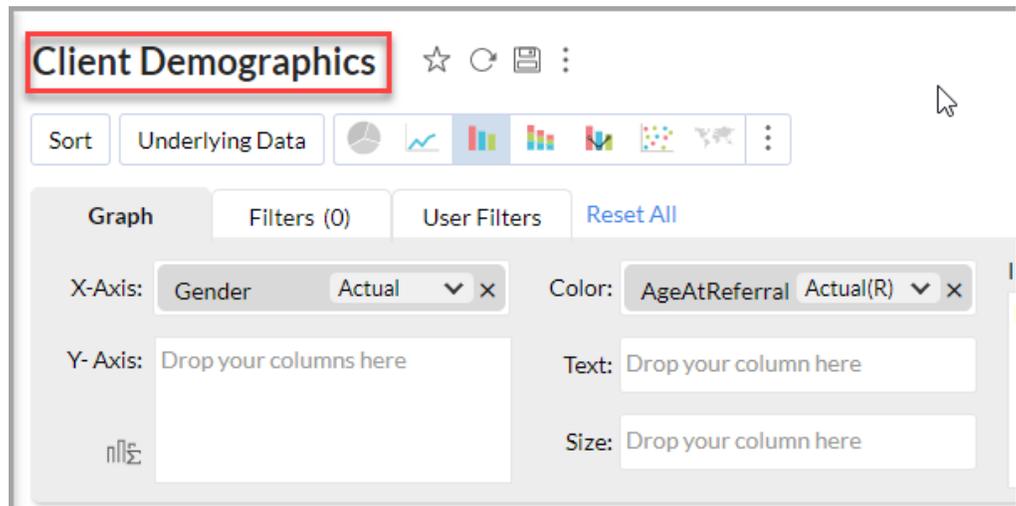


- c. Decide what your **base table** will be (e.g., Cases if you are creating a report about individual clients; Activities or Reports if you are creating a report about a particular Activity or Report in extendedReach)

- d. Drag a few columns into the report builder interface
  - i. **Search** for a column

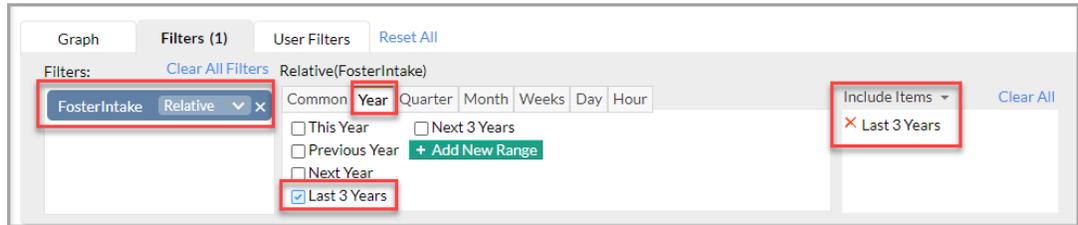


- ii. **Name** the report



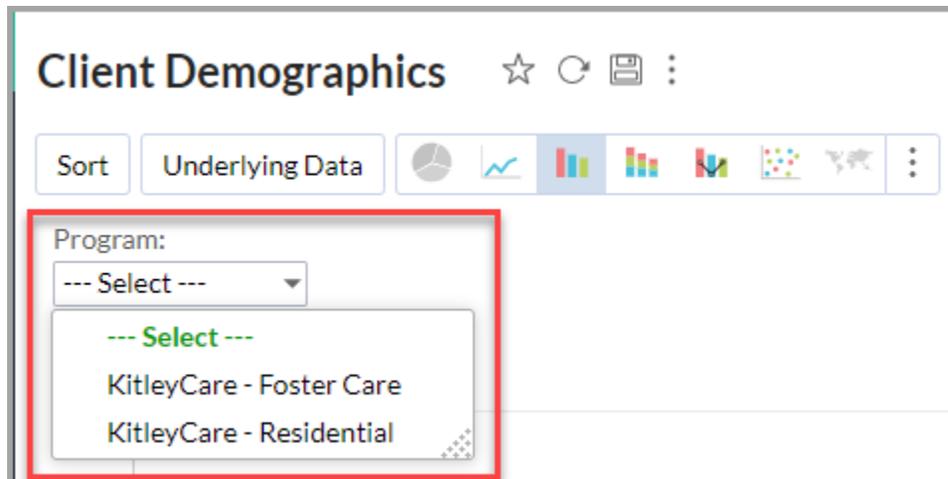
#### 4. Filters vs User Filters

- 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

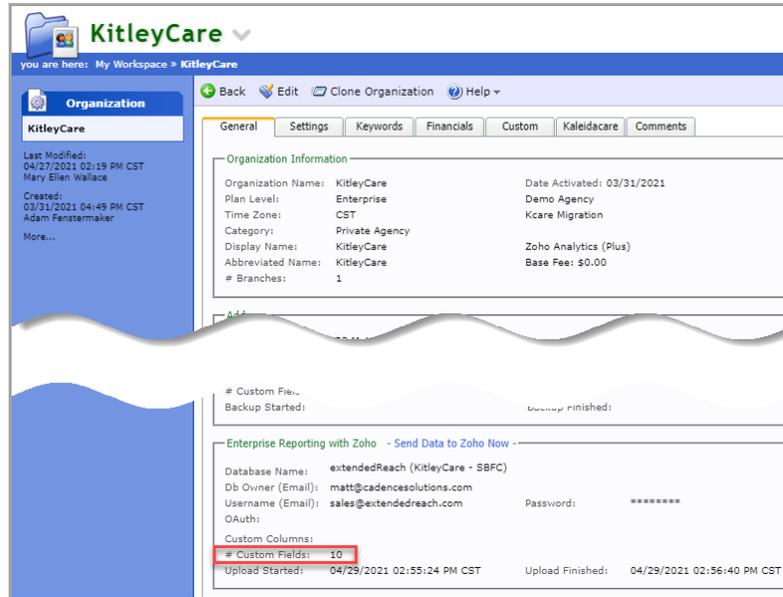
- b. **User filter:** allows end users to change the filter as necessary



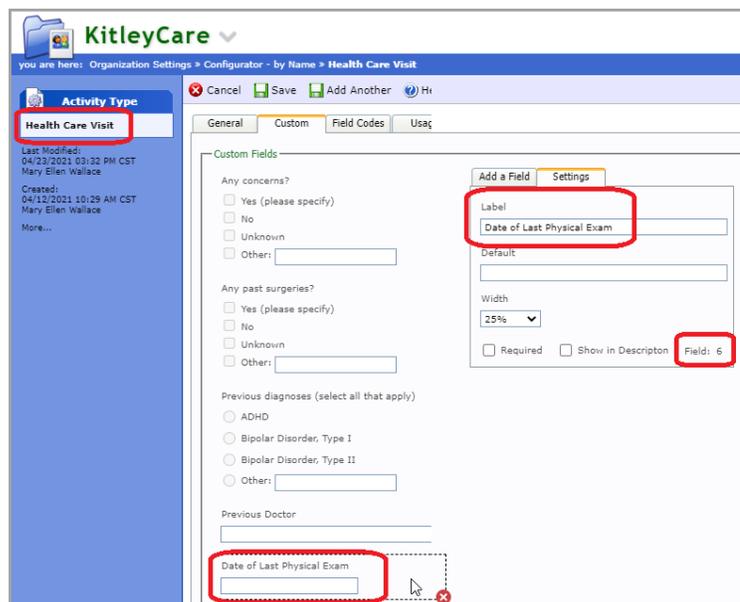
Ex: If you want to allow end users to select which program to view – some users will want to see Foster Care, and some will want to see Residential

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.



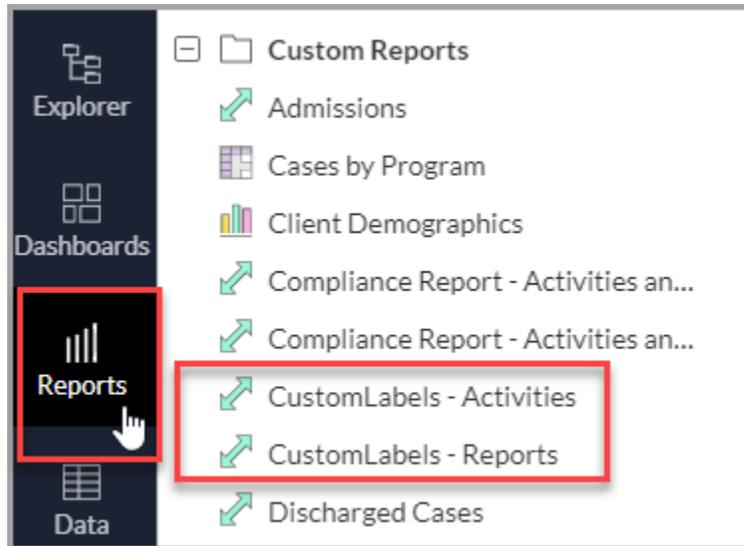
- iii. For example, if I wanted to see the 'Date of Last Physical Exam' for clients in my Foster Care program, and I knew I collected those dates in my Health Care Visit Activity, I would find the custom field number for that field (in this case, 6) and pull in CustomField6 to my report.

The screenshot shows a reporting tool interface with a pivot table configuration and a data table. The 'Rows' section has 'CustomField6' selected. The table below shows columns for Name, Program, and CustomField6, with specific dates highlighted in red boxes.

	Name ↓	Program ↓	CustomField6 ↓
1	Alboucq, Brian	KitleyCare - Foster Care	-No Value-
2	Braverman, Adam	KitleyCare - Foster Care	-No Value-
3			03/15/2019
4	Braverman, Julia	KitleyCare - Foster Care	-No Value-
5			04/01/2019
6	Jackson, Judy	KitleyCare - Residential	-No Value-
7	Venture, Albert	KitleyCare - Residential	-No Value-
8	Venture, Baby 2	KitleyCare - Foster Care	-No Value-

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.

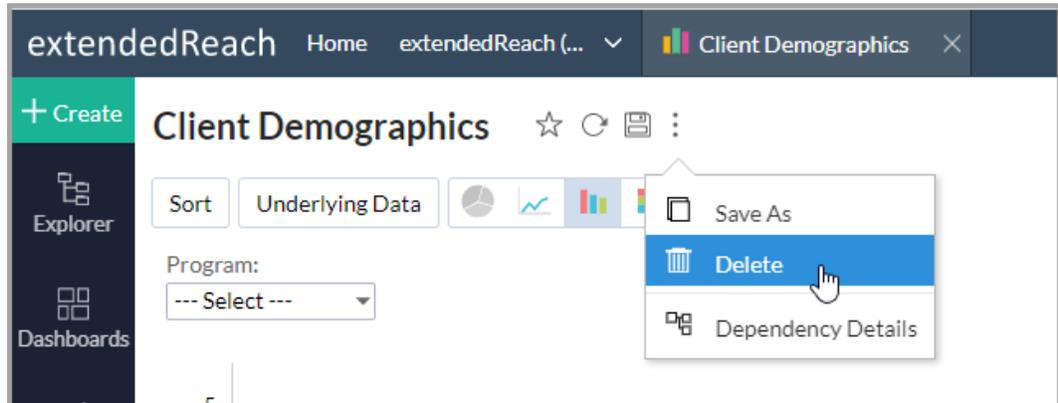
The screenshot shows the 'CustomLabels - Activities' report interface. The title 'CustomLabels - Activities' is highlighted with a red box. Below the title are buttons for Sort, Show/Hide, Underlying Data, and Themes. The main content is a table with columns: Program, ActivityType, CustomLabel1, and CustomLabel6. The first row is highlighted with a red box, showing 'KitleyCare - Foster Care' under Program and 'Adoptive Home Visit' under ActivityType. The second row shows 'Health Care Visit' under ActivityType. The third row shows 'KitleyCare - Residential' under Program and 'Adoptive Home Visit' under ActivityType. The CustomLabel6 column is also highlighted with a red box, showing 'Date of Last Physical Exam' for the second row.

	Program	ActivityType	CustomLabel1	CustomLabel6
1	KitleyCare - Foster Care	Adoptive Home Visit	-No Value-	-No Value-
2		Health Care Visit	-No Value-	Date of Last Physical Exam
3	KitleyCare - Residential	Adoptive Home Visit	-No Value-	-No Value-

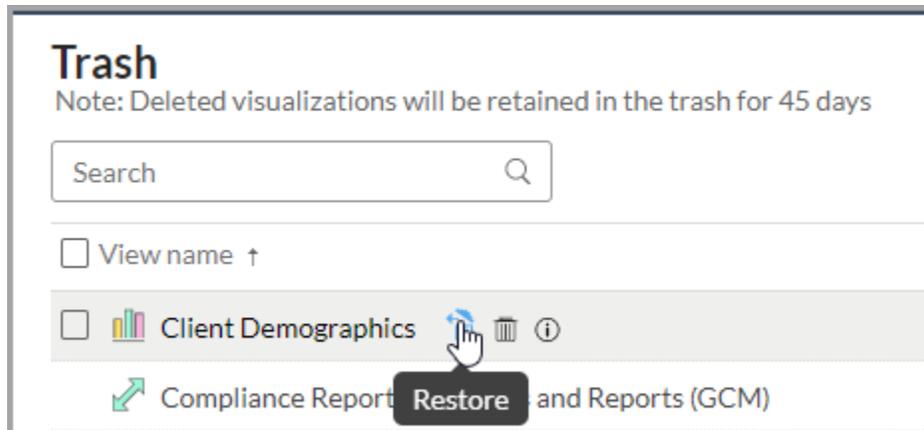
- iv. **Note:** If custom fields are moved around within a form, their corresponding field numbers generally stay the same. However, if custom field labels change, you can use the CreatedDate on the right side of these reports to determine which contains the latest labels.
- v. **\*Note:** If you do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

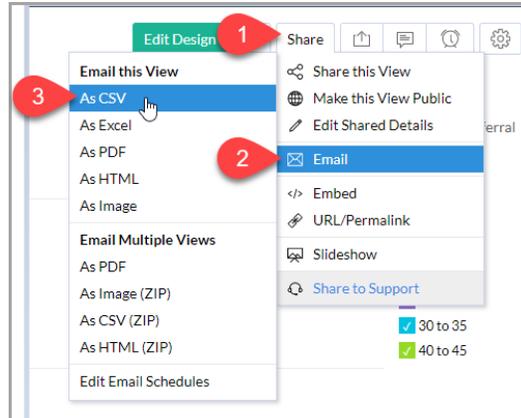


- b. When an item is deleted, it is recoverable for up to 45 days in the 'Trash' located at the bottom of the left sidebar.



## 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

A screenshot of the 'Email as CSV' settings form. The form is titled 'Email as CSV' and has a 'Report Options' tab. The 'From:' field is set to 'mwallace@kaleidacare.com'. The 'To:' field is highlighted with a red box and contains the email address 'staffname@extendedreach.com'. A green callout box with an arrow points to the 'Send a copy to me' checkbox, with the text 'Do not check this box'. The 'Subject:' field is set to 'Check out the "Client Demographics" report'. The 'Message:' field contains the text: 'Hi, Check out the "Client Demographics" report attached to this email. Thank you and have a nice day, Mary Ellen Wallace'. The 'Schedule Email' section is highlighted with a red box and shows a 'Schedule:' dropdown menu set to 'None'. The 'Advanced Options' section contains several checkboxes: 'Apply corresponding share filter criteria', 'Apply default user filters', 'Do not send this email when there is no data in the report', and 'Append email sent time in subject'. A note at the bottom states: 'Note: Emails cannot be sent if the report exceeds 15MB.' The form has 'Send' and 'Cancel' buttons at the bottom.

2. Set a **password**

Email as CSV

Email **Report Options**

File Name:\*  
Client Demographics

Export the:  
Current View (Data)

Include  
 Column Header  User Filter Criteria  Drill Down Flow

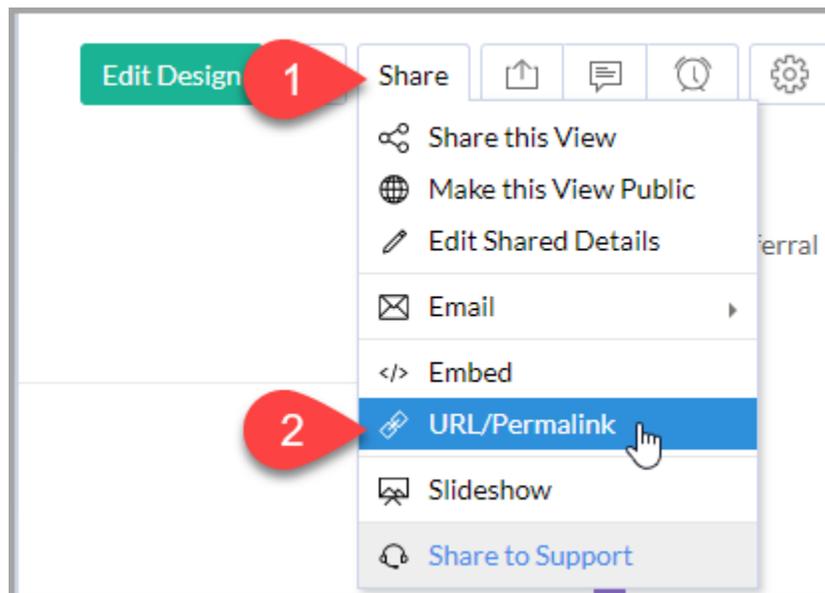
CSV Settings  
 Set Password ?

Password:  
[Text Field] [Show Password](#)

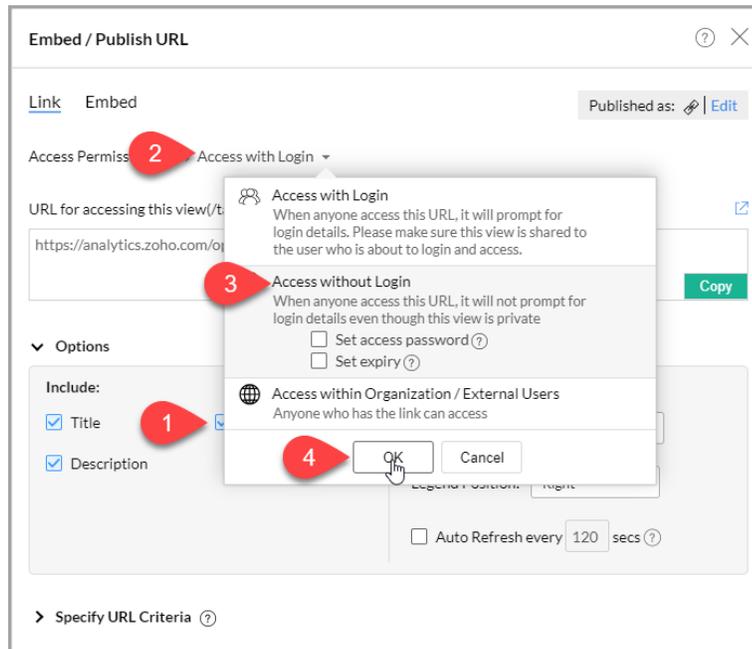
Must have minimum 6 characters

Retype Password:  
[Text Field]

- b. Make available in **extendedReach**
  - i. Share > **URL/Permalink**

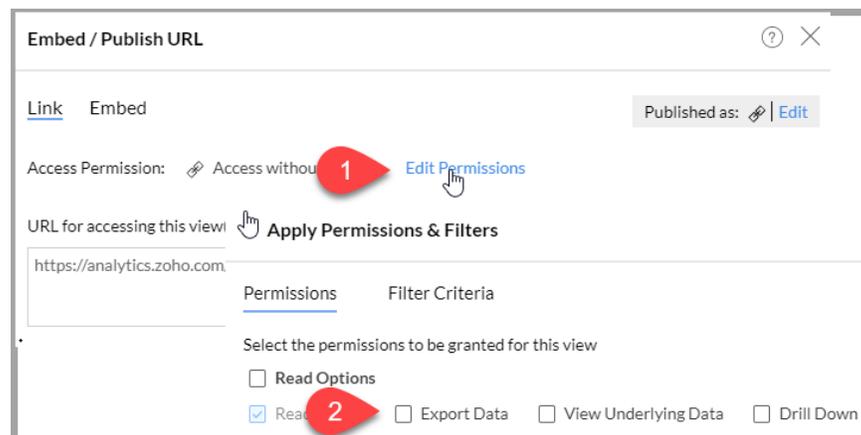


1. Include **Toolbar**
2. **Access without login**

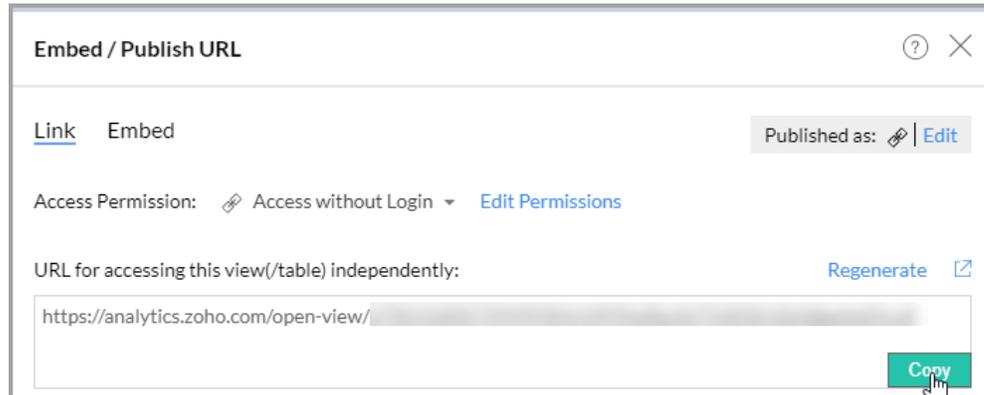


## ii. Edit Permissions

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



### iii. Copy the URL



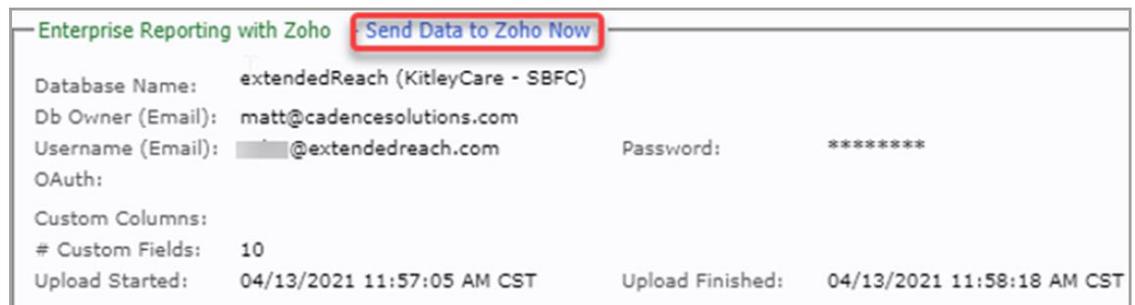
### iv. Paste the URL into Custom Side Menu box in extendedReach

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'



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](mailto: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](mailto: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.