Summary

Bucketing lets you quickly categorize report records without creating a formula or a custom field. When you create a bucket field, you define multiple categories (buckets) used to group report values.

Adding and Editing Bucket Fields

1. Take one of the following steps:
   - To add a bucket field: In the Fields pane of the report builder, double-click Add Bucket Field or drag it into the report preview. You can add up to five bucket fields per report, each with up to 20 buckets.
   - In the report builder Fields pane under Bucket Fields, hover over a bucket field and click 📝. Or in the Preview pane, click the bucket field column menu and select Edit Bucket Field.

2. Edit the bucket field according to the field type.
   - Editing Numeric Bucket Fields
   - Editing Picklist Bucket Fields
   - Editing Text Bucket Fields

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Editing Numeric Bucket Fields

In the Edit Bucket Field overlay for a numeric field:

1. For **Source Column**, select the field you want to bucket.
2. Enter a bucket field name. This appears as the column name in the report.
   Since a bucket field is intended to have multiple buckets (known as “ranges” in numeric bucket fields) within it, a good name for a bucket field describes the scope of the ranges. For example, a bucket field named “Size” could have ranges of “Small,” “Medium,” and “Large”.
3. Define your ranges by entering a number and a name. The range names appear as values in your new column.
   Each range is greater than the lower number up to and including the higher number.
   To remove all ranges and start over, click **Clear All**.
4. To move all empty values to the bucket containing the value zero, enable **Treat empty source column values in the report as zeros**.
   If this is disabled, unbucketed values appear as a dash (-) in the column.
5. Click **OK**.

In a report, numeric bucket columns are sorted by range values.

Numeric Bucketing Example: Deal Size

To gain insight into your deals, use bucketing to group by deal size instead of looking at individual deals. This lets you concentrate on the large deals that affect your quota the most.

1. Create or edit a standard opportunity report.
2. In the Fields pane of the report builder, double-click **Add Bucket Field** or drag it into the report.
3. For **Source Column**, select **Amount**.
4. For **Bucket Field Name**, enter **Deal Size**.
5. Under **Define Ranges**, enter 1000 in the first row. This represents the maximum for a small deal.
   Name this range **Small**.
6. Click **Add** and enter 25000 in the second row. This represents the maximum for a medium-size deal.
   Name this range **Medium**.
7. By default, the last range is any amount over the previous range. You don’t need to enter a number for this range. Name this range **Large**.
8. Click **OK**.
With numeric bucket fields, each range is greater than the lower number, up to and including the higher number. Once you’ve set up this bucket field, amounts will be bucketed as follows:

<table>
<thead>
<tr>
<th>Amounts</th>
<th>Bucket</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000 or less</td>
<td>Small</td>
</tr>
<tr>
<td>1001 to 25000</td>
<td>Medium</td>
</tr>
<tr>
<td>25001 or more</td>
<td>Large</td>
</tr>
</tbody>
</table>

**Editing Picklist Bucket Fields**

The following picklist types can’t be bucketed:

- Record types
- Divisions
- Multi-value picklists
- The Type picklist in Activity reports

In the Edit Bucket Field overlay for a picklist field:

1. For Source Column, select the field you want to bucket.
2. Enter a bucket field name. This appears as the column name in the report.

   Since a bucket field is intended to have multiple buckets within it, a good name for a bucket field describes the scope of the buckets. For example, a bucket field named “Priority” could have “High,” “Medium,” and “Low” buckets.

   **Important:** Picklist bucket names must include one or more letters or symbols. If a picklist bucket field includes a bucket whose name contains only numbers, the bucket field cannot be saved.
3. To create a bucket, click New Bucket and enter a bucket name. Create multiple buckets to group your report records.

4. To find a particular value in the list of values, type the first few characters of its name in the Quick Find box. As you type, items that match your search terms appear in the menu.

5. Select values and drag them into a bucket. Alternatively, select values, click Move To, and select a bucket or enter a new bucket name.

While you’re bucketing values, use these functions as needed:
- To show all the values in the report, click All Values.
- To show the values for a particular bucket, click the bucket name.
- To remove values from a bucket, select the values and drag them to another bucket, or drag them to Unbucketed Values.

Note: You can bucket only active picklist values. Inactive picklist values aren’t shown.

6. To move all unbucketed values into a bucket named “Other”, enable Show unbucketed values as “Other”. If this is disabled, unbucketed values appear in the bucket column with the value name.

7. Click OK.

In a report, picklist bucket columns are sorted by the bucket position as shown in the Edit Bucket Field dialog box, followed by “Other” if Show unbucketed values as “Other” is enabled, or the unbucketed picklist item names if Show unbucketed values as “Other” is disabled.

Picklist Bucketing Example: Industry Types

1. Create or edit a standard accounts report, making sure at least a few records appear in the report.

2. In the Fields pane of the report builder, double-click Add Bucket Field or drag it into the report.

3. For Source Column, select Industry.

4. For Bucket Field Name, enter Industry Types.

5. Click New Bucket and name the bucket IT.

6. Click New Bucket and name the bucket Bio Tech.

7. Click New Bucket and name the bucket Telecom.

8. Select values and drag them into the appropriate buckets.

9. Enable Show unbucketed values as “Other”.

10. Click OK.
Editing Text Bucket Fields

The following text types can’t be bucketed.

- Text area
- Text area—long
- Text area—rich
- Text area—encrypted
- URL
- Date
- Date/Time

In the Edit Bucket Field overlay for a text field:

1. For Source Column, select the field you want to bucket.
2. Enter a bucket field name. This appears as the column name in the report.
   Since a bucket field is intended to have multiple buckets within it, a good name for a bucket field describes the scope of the buckets. For example, a bucket field named “Region” could have “East,” “West,” and “Central” buckets.
3. To create a bucket, click New Bucket and enter a bucket name. Create multiple buckets to group your report records.
4. To find a particular value in the list of values, type all or part of its name in the Search for values... box and click Search, or leave the box empty and click Search.
   The search returns up to 200 values.
5. Select values and drag them into a bucket. Alternatively, select values, click Move To, and select a bucket or enter a new bucket name.

While you’re bucketing values, use these functions as needed:
- Use Enter Values to enter the exact name of a value you want to bucket, or to bucket values that may appear in your report later.
- To show the values for a particular bucket, click the bucket name.
- To remove values from a bucket, select the values, select Move To, and select a bucket or enter a new bucket name.

6. To move all unbucketed values into a bucket named “Other,” enable Show unbucketed values as “Other”. If this is disabled, unbucketed values appear in the bucket column with the value name.

7. Click OK.

In a report, text bucket columns are sorted in alphanumeric order.

Text Bucketing Example: Strategic Accounts

1. Create or edit a standard account report, making sure at least a few records appear in the report.
2. In the Fields pane of the report builder, double-click Add Bucket Field or drag it into the report.
3. For Source Column, select Account Name.
4. For Bucket Field Name, enter Strategic.
5. Click New Bucket and name the bucket IBM.
6. Click New Bucket and name the bucket Dell.
7. Click New Bucket and name the bucket HP.
8. To show the available values, leave the Search for values... box empty and click Search.
9. Select values and drag them into the appropriate buckets.
10. Enable Show unbucketed values as “Other”.
11. Click OK.
Text Bucketing Example: Strategic Accounts

Using Bucket Fields

Edit Bucket Field

Use bucket fields to group, filter, or arrange report data. Create multiple buckets in this bucket field to group your report records.

Source Column: Account Name
Bucket Field Name: Strategic

Show unbucketed values as "Other."