



USING BUCKET FIELDS

Summary

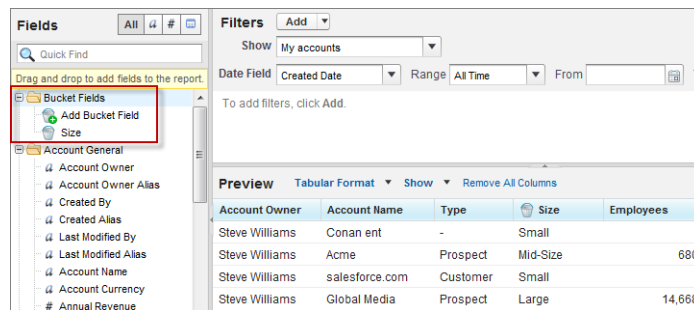
Bucketing lets you quickly categorize report records, without having to create a formula or a custom field.

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.

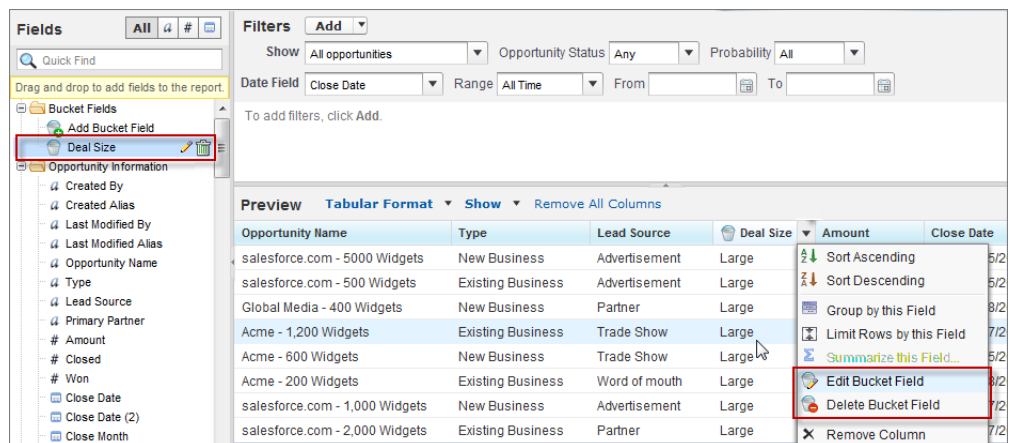
Adding and Editing Bucket Fields

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

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**.

Edit Bucket Field Help for this Page ? x

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

Source Column: Amount

Bucket Field Name: Deal Size

Define Ranges Clear All

Range	Name
<= 1,000	Small
> 1,000 to 25,000	Medium Delete
> 25,000	Large

Treat empty **Amount** values in the report as zeros.

OK Cancel

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:

Amounts	Bucket
1000 or less	Small
1001 to 25000	Medium
25001 or more	Large

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**.

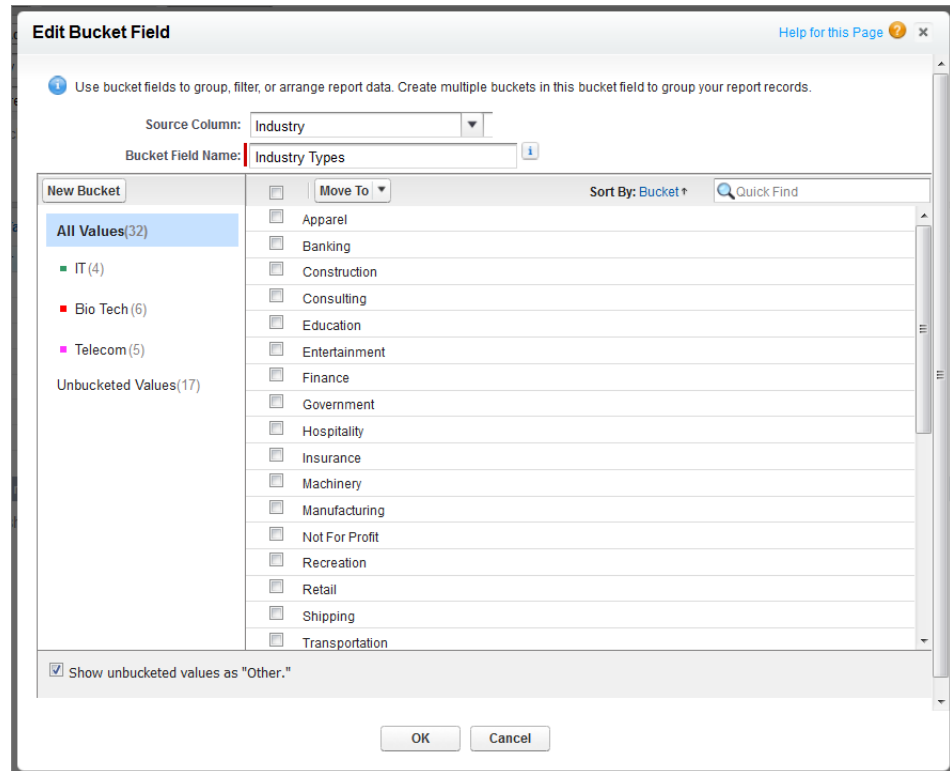
 **Note:** You can bucket only active picklist values. Inactive picklist values aren't shown.

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**.

Edit Bucket Field Help for this Page ? x

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

New Bucket Move To Sort By: Bucket ↑ Quick Find

Search for Values

Enter Values

Bucketed Values(8)

- IBM (3)
- Dell (3)
- HP (2)

<input type="checkbox"/>	Dell Barton Tech
<input type="checkbox"/>	Dell Fast Buy
<input type="checkbox"/>	Dell Pacific Partners
<input type="checkbox"/>	HP Media Oats
<input type="checkbox"/>	HP Wilson & Associates
<input type="checkbox"/>	IBM Ace Fasteners
<input type="checkbox"/>	IBM Orange Designs
<input type="checkbox"/>	IBM Wrasse Systems

Show unbucketed values as "Other."