

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.

Fields All 4 # C	3	Filters Add	•	_		
Q Quick Find		Show My acc	ounts	7		
Drag and drop to add fields to the repo	ort.	Date Field Created	Date 💌 Ran	ge All Time	▼ From	
Bucket Field Add Bucket Field Size Account General Account Owner Account Owner Alias	To add fillers, click Add. E Preview Tabular Format Y Show Y Remove All Columns					
Greated By Greated Alias		Account Owner	Account Name	Туре	💮 Size	Employees
4 Last Modified By		Steve Williams	Conan ent	-	Small	
a Last Modified Alias		Steve Williams	Acme	Prospect	Mid-Size	68
 A Account Name A Account Currency 		Steve Williams	salesforce.com	Customer	Small	

 In the report builder Fields pane under Bucket Fields, hover over a bucket field and click *2*. Or in the Preview pane, click the bucket field column menu and select **Edit Bucket Field**.

Fields All a # 🗔	Filters Add V				
Q Quick Find	Show All opportunities	 Opportunity Stat 	us Any 🔻	Probability All	▼
Drag and drop to add fields to the report.	Date Field Close Date 💌	Range All Time	From	То	1
Bucket Fields Add Bucket Field Deal Size Opportunity Information	To add filters, click Add.				
a Created By Created Alias	Preview Tabular Format 🔻	Show Remove	All Columns		
4 Last Modified By	Opportunity Name	Туре	Lead Source	💮 Deal Size	 Amount Close Date
4 Opportunity Name	salesforce.com - 5000 Widgets	New Business	Advertisement	Large	2↓ Sort Ascending 5
а Туре	salesforce.com - 500 Widgets	Existing Business	Advertisement	Large	Sort Descending 5
4 Lead Source	Global Media - 400 Widgets	New Business	Partner	Large	Group by this Field
# Amount	Acme - 1,200 Widgets	Existing Business	Trade Show	Large	Limit Rows by this Field 7
# Closed	Acme - 600 Widgets	New Business	Trade Show	Large	Σ Summarize this Field 5
# Won	Acme - 200 Widgets	Existing Business	Word of mouth	Large	🐤 Edit Bucket Field
Close Date	salesforce.com - 1,000 Widgets	New Business	Advertisement	Large	🔁 Delete Bucket Field 🛛 💡
Close Date (2)	salesforce.com - 2,000 Widgets	Existing Business	Partner	Large	× Remove Column 7

- 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.

		Deal Size	1	
efine Ranges	i			Clear
Rai	nge		Name	
<=		1,000	Small	
	,000 to	25,000	Medium Delete	
>	25,000		Large	

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.

Source Colum	n: Industry	•				
Bucket Field Nam	e: Industry Types		i			
New Bucket	Move To 💌			Sort By: Bucket *	Quick Find	
New Ducket				SOIL By. BUCKELT	Coulor Find	
All Values(32)						
 IT (4) 	Banking Construction					
- 11 (4)						
Bio Tech (6)	Octobalang					
– T -leaser (5)						
 Telecom (5) 						
Unbucketed Values(17)						
	Insurance					
	Machinery					
	Manufacturing					
	Not For Profit					
	Recreation					
	Retail					
	Shipping					
	Transportation					

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.

Source Column:	Accour	nt Name	*			
Bucket Field Name:	_		i			
New Bucket		Move To 💌		Sort By: Bucket *	Quick Find	
Search for Values		Dell Barton Tech				
Enter Values		Dell Fast Buy				
Bucketed Values(8)		Dell Pacific Partners				
Ducketed values(0)		HP Media Oats HP Wilson & Associates				
 IBM (3) 		IBM Ace Fasteners				
 Dell (3) 		IBM Ace Pasteners				
		IBM Wrasse Systems				
 HP (2) 		Ibm Widdoc Oysterna				
Show unbucketed values as	"Other."					