



# SALESFORCE REPORTS FOR EXCEL (PILOT)

## Abstract

Use the Salesforce Reports for Excel add-in to import Salesforce reports into Excel 2010 or 2007.

## About Salesforce Reports for Excel

Available in: **Enterprise** and **Unlimited** Editions

Use Salesforce Reports for Excel to:

- Import Salesforce data into Excel and apply formulas and formatting.
- Combine different data sets using Excel's VLOOKUP function.
- Refresh data in Excel with information from Salesforce. (Data connection is limited to the current Excel session.)
- Build dashboards using Excel pivot tables and charts.

To give us feedback and to collaborate with other pilot participants, join the [Salesforce Reports for Excel Chatter group](#).



**Note:** Salesforce Reports for Excel is currently available in an unsupported pilot release. Any unreleased services or features referenced in this or other documentation are not currently available and may not be delivered on time or at all. Customers who purchase our services should make purchasing decisions on the basis of features that are currently available.

## Requirements

Verify that you meet system and other requirements for Salesforce Reports for Excel.

### System Requirements

- Microsoft® Excel® 2010 (64-bit and 32-bit) or 2007
- Microsoft Windows® 7 (64-bit and 32-bit), Windows Vista® (32-bit only), or Windows XP (32-bit only)
- Latest versions of hot fixes for Microsoft® Office® and Windows
- System administrator privileges (if you don't have system administrator privileges for your computer, contact your IT department)

## Other Requirements

- Microsoft .NET Framework 4
- Microsoft Visual Studio® 2010 Tools for Office Runtime
- Primary Interop Assemblies (PIA) Redistributable for your version of Microsoft Excel
- Single sign-on: My Domain required if you use SAML in Salesforce Reports for Excel (Salesforce Reports for Excel uses the OAuth protocol for single sign-on; using a separate online identity provider for single sign-on is not supported)

Microsoft Office Click-to-Run is not supported.

## Installing the Add-In

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Install the Salesforce Reports for Excel add-in for Microsoft Excel 2010 or 2007.

1. Close all Microsoft Office programs.
2. On your desktop, double-click Salesforce Reports for Excel. If a security warning appears, click **Run** to continue the installation.  
The Salesforce Reports for Excel Setup Wizard opens.
3. In the Setup Wizard, follow the prompts. After you click **Finish**, open Excel.  
If a message says the publisher cannot be verified, click **Install** to continue.

The tabs in Excel now include a Salesforce tab.

## Importing Reports into Excel

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When you use Salesforce Reports for Excel to import a report, choose the location and format of the import.

1. In Excel, click the Salesforce tab to display the Salesforce Reports for Excel toolbar.
2. In the toolbar, click **User**. In the dialog box that appears, choose the Salesforce organization containing the data that you want to import. Enter your user name and password.



**Note:** After you have logged in once, it's not necessary to log in again unless you want to log in as a different user.

3. Open the worksheet where you want to import a report. Position the cursor in the cell where you want the import to start.
4. In the toolbar, click **Import**. The Import Report dialog box opens.
5. In the dialog box, find the report that you want to import. Then choose importing and formatting options as shown:

Option	Details
View reports in a folder	In the Folders list, double-click a folder.

Option	Details
Find a report by name	Use <b>Search</b> . (You can search report names only, not folder names.)
Sort reports by ID, name, or folder	Click a column header under <b>Reports</b> .
Change the worksheet into which you import a report	Use the <b>Destination Worksheet</b> drop-down menu.  Avoid renaming worksheets that contain imported reports.
Start the import in a different cell	Enter a different value in the <b>Cell</b> field.
Retain the colors, fonts, subtotals, and grand totals from the Salesforce report, and keep your Excel file small	Select <b>Formatted</b> .
Do not retain formatting, subtotals, or grand totals	Select <b>Raw Data</b> .



**Note:** Salesforce Reports for Excel does not currently support formatting in Salesforce Groups.

6. Click **Import**.
7. Save the Excel file.



**Note:** Excel may limit imports to 256 columns and 65,536 rows of data at a time. Before you import data, it may be necessary to create a custom report in Salesforce, depending on the data set that you want to import into Excel.

## Viewing, Updating, and Searching Reports

After you have imported one or more Salesforce reports into Excel, you can use Salesforce Reports for Excel to view a list of imported reports, update report data, and search for more reports to import.

- **Active:** View a list of reports imported since you opened Excel. (When you exit Excel, Salesforce Reports for Excel loses all data connections to Salesforce reports.)
- **Refresh All:** Update data in all reports, including pivot tables and charts, imported since you opened Excel.
- **Update Pivots:** Update pivot tables and charts only.
- **Search:** Search reports by name.