

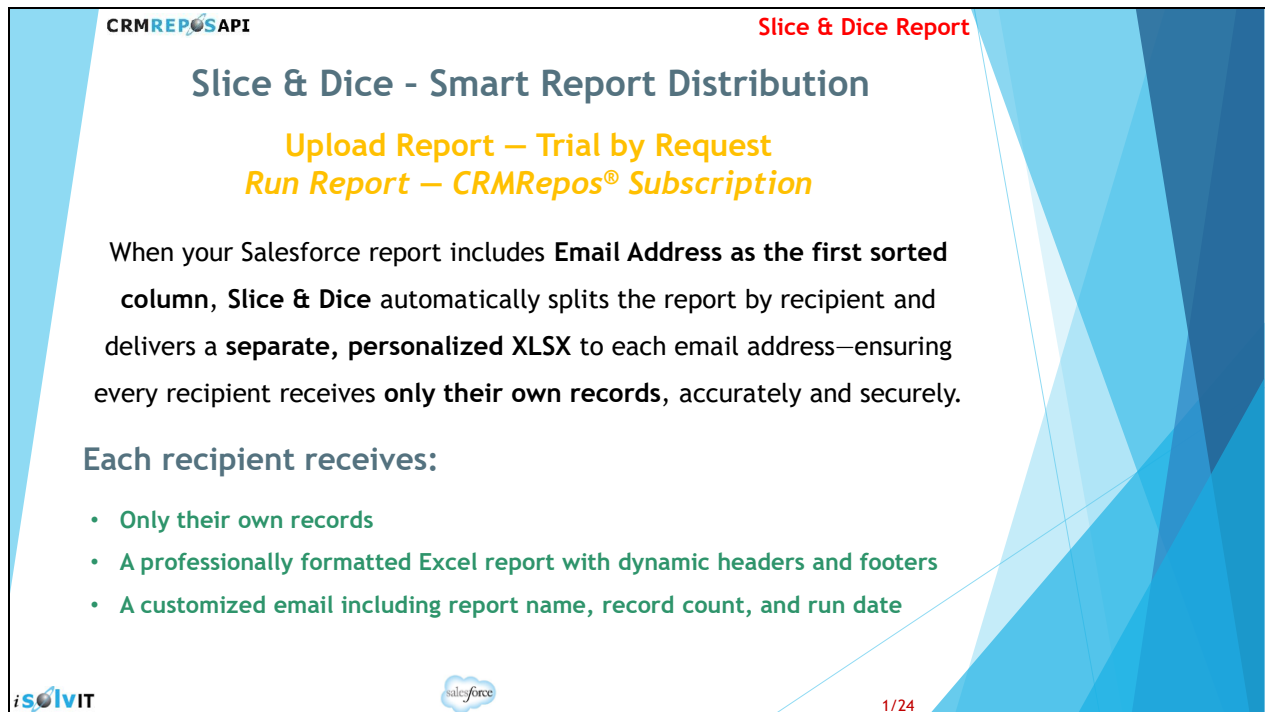


Image 1

Slice & Dice Report Distribution Overview

Slice & Dice automates intelligent report distribution by eliminating the need for manual exporting, filtering, and re-sending of the same Salesforce report to multiple users. Instead of repeating these steps for each recipient, you simply **run or upload the report once**, and the system manages the entire distribution process.

Slice & Dice evaluates the **email address column** in the report and automatically splits the data into **personalized datasets**. Each recipient receives only their relevant slice, delivered as a **professionally formatted Excel file** that includes a customized **header and footer**, **record count**, and **run date**.

What was once a repetitive, manual task is transformed into a **fully automated workflow**, improving efficiency, accuracy, and consistency across all report distributions.

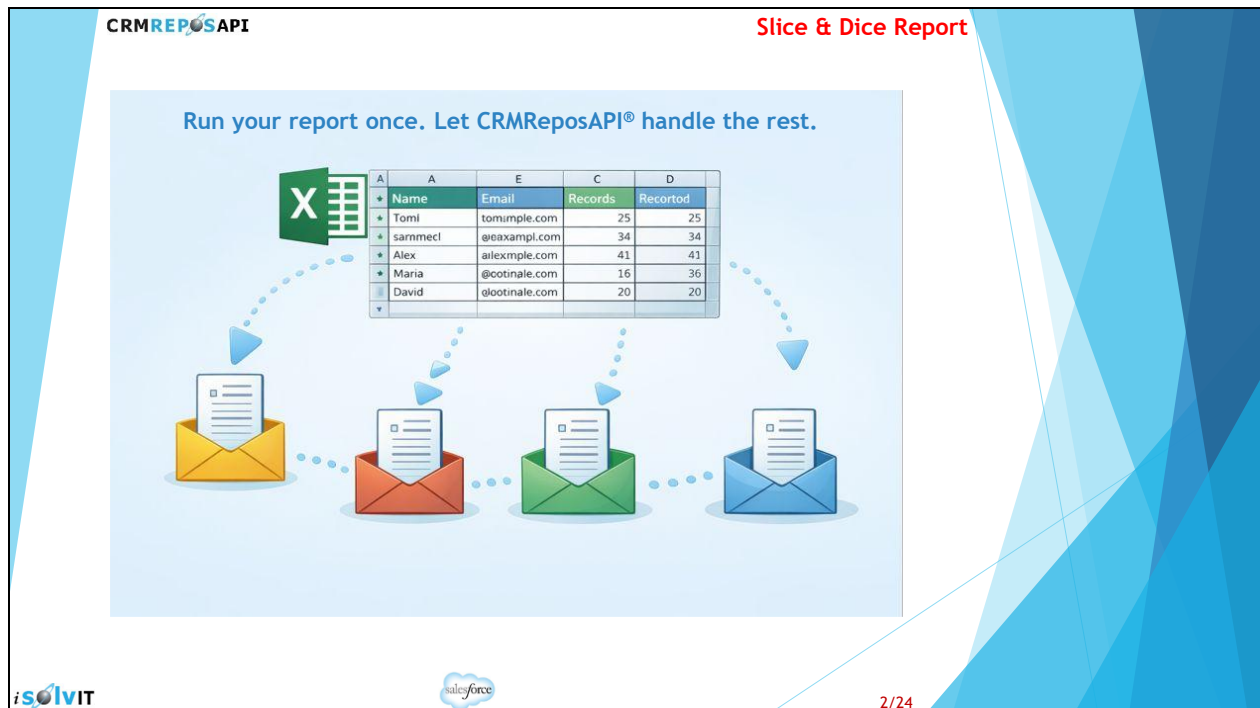


Image 2

Common Use Cases and Operational Integration

Common use cases for **Slice & Dice** include **compliance reporting**, **sales distribution**, **follow-up notifications**, **data cleansing**, **department-specific reporting**, and **recurring report delivery** on a **daily, weekly, or monthly** basis.

Slice & Dice integrates seamlessly with the **one-click download and processing engine**, ensuring a consistent and intuitive user experience whether reports are generated **on demand** or **distributed automatically**. This unified approach allows organizations to standardize report formatting, security, and delivery while supporting both ad hoc and scheduled reporting workflows.

The screenshot displays the 'CRMREPOSAPI' interface with a 'Slice & Dice Report' section. It is divided into three numbered steps:

- Export the Report** (Step 1):
 1. Run the report
 - In your Salesforce Report Tab.
 2. Choose Export and Save
 - Select Details file (Excel format).
 3. Name the file descriptively
 - Example: ReportName_Tabular.xls.
- App - CRMRepos API Page** (Step 2):
 1. Search for Report Name
 - In the search bar, enter the name of the report you wish to process.
 2. Get the Selected Report
 - Click the **Get Selected Report** button to load the report configuration.
 3. Upload the Details File
 - Drag and drop your ReportName_Detail.xls (the detailed exported report) into the **upload box**.
 4. Slice & Dice Check
 - Edit Email Subject and Body
 5. Save the Report
 - If you are adding a new report or updating an existing one, **Click to Save Report** to store the uploaded file.
 6. Proceed
 - Click the **Next** button to continue.
- Process Uploaded Report** (Step 3):
 1. Process the Uploaded Report
 - Click on **Process Uploaded Report** to begin processing the uploaded data.
 2. Download the Processed File
 - Once processing is complete, click **Click To Download Uploaded File** to download the processed report.

The interface includes logos for iSOLvIT, CRMREPOSAPI, and Salesforce. A page indicator '3/24' is visible in the bottom right corner.

Image 3

Process Steps

This screen outlines the complete workflow for processing a **Tabular Salesforce report** through **CRMReposAPI** using **Slice & Dice**.

The process begins in **Salesforce**, where you run the report and export it in **Excel (Details)** format using a clear, descriptive file name. Once the file is saved locally, open the **CRMReposAPI App Page** to load the report configuration and prepare the file for processing.

First, search for the report using the **smart lookup** field. After selecting the intended report, click **Get Selected Report** to retrieve all stored settings associated with it. These settings include the configured **header and footer templates**, **formatting rules**, and **Slice & Dice** options.

Next, **drag and drop** the exported **Details** file into the upload area and set the **Report Format** to **Tabular**. This ensures that CRMReposAPI applies the predefined header, footer, and formatting logic correctly. You may also review or edit the **Email Subject** and **Email Body** used for report distribution.

If this is a new configuration, or if changes were made to an existing setup, click **Save**, then click **Next** to proceed.

Slice & Dice then evaluates the designated **X-variables** such as **email address**, **record owner**, **department**, or **territory** and automatically splits the report into **personalized datasets**. Each recipient receives only their relevant slice, delivered as a **professionally formatted Excel file** that includes a customized **header and footer**, **record count**, and **run date**. What was once a repetitive manual task is transformed into a **fully automated distribution workflow**.

After the report is fully configured, click **Process Uploaded Report**. CRMReposAPI reads the uploaded data, applies all formatting and Slice & Dice logic, and generates the final **XLSX** files.

When processing is complete, **Click to Download Uploaded File** to download the finished, fully formatted, and compliance-ready Excel report.

CRMREPOSAPI Upload Slice & Dice Report

CRMREPOSAPI Search...

Report Header/Footer CRMRepos API Page Reports

Report: Contacts & Accounts
Contacts List SliceDice SU

100 Total Records

1st column is sorted

Email Address in 1st column

	Email Manager	Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id
1	tzsaarour@gmail.com	00360000013RJM	Anita	Stanton	0019000003mcYw	Montes-Singleton	Manufacturing	Prospect	ACC002
2	tzsaarour@gmail.com	00360000013RJO	Julie	Cunningham	0019000003mcYx	Kelly PLC	Manufacturing	Customer	ACC003
3	tzsaarour@gmail.com	00360000013RUJ	Tyler	Young	0019000003mcYy	Mueller-Malone	Manufacturing	Partner	ACC004
4	tzsaarour@gmail.com	00360000013RUT	Jesus	Johnson	0019000003mcZ3	Levy-Cooper	Retail	Partner	ACC009
5	tzsaarour@gmail.com	00360000013RUJ	Margaret	Smith	0019000003mcZ4	Navarro PLC	Manufacturing	Prospect	ACC010
6	tzsaarour@gmail.com	00360000013RUV	Mary	West	0019000003mcZ5	Logan-Martin	Healthcare	Partner	ACC011
7	tzsaarour@gmail.com	00360000013RUV				Rayes	Finance	Partner	ACC012
8	tzsaarour@gmail.com	00360000013RUV				LLC	Retail	Partner	ACC014
9	tzsaarour@gmail.com	00360000013R3e	Kevin	Green	0019000003mcZE	Monty-Henderson	Healthcare	Prospect	ACC020
10	tzsaarour@gmail.com	00360000013R3f	Kevin	Evans	0019000003mcZF	Johnson, Scott and Morgan	Finance	Customer	ACC021
11	tzsaarour@gmail.com	00360000013R3o	Tammy	Diaz	0019000003mcZO	Martinez, Davis and Anderson	Manufacturing	Partner	ACC030
12	tzsaarour@gmail.com	00360000013R3p	Brianna	Gutierrez	0019000003mcZP	Jackson Inc	Finance	Partner	ACC031
13	tzsaarour@gmail.com	00360000013R3q	Anthony	Valencia	0019000003mcZQ	James Group	Technology	Prospect	ACC032
14	tzsaarour@gmail.com	00360000013R3z	James	Logan	0019000003mcZZ	Lee-Schultz	Retail	Prospect	ACC041
15	tzsaarour@gmail.com	00360000013R3V	Catherine	Miller	0019000003mcZT	Martin, Owens and Velazquez	Retail	Prospect	ACC047
16	tzsaarour@gmail.com	00360000013R3V	Candice	Clay	0019000003mcZQ	Lopez LLC	Healthcare	Prospect	ACC051
17	tzsaarour@gmail.com	00360000013R3B	George	White	0019000003mcZD	Kelly and Sons	Manufacturing	Prospect	ACC053
18	tzsaarour@gmail.com	00360000013R3C	Lafaya	Jordan	0019000003mcZm	Lopez-Bennett	Finance	Prospect	ACC054
19	tzsaarour@gmail.com	00360000013R3K	Amanda	Hancock	0019000003mcZu	Mendoza, Lewis and Rodriguez	Healthcare	Partner	ACC062

iSOLVIT salesforce 4/24

Image 4

Report Requirement

Slice & Dice relies on a simple but essential structural requirement: the **first column** of the **tabular Salesforce report** must contain the **recipient's email address**, and the report must be **sorted by that email column in Salesforce** before export.

This structure enables Slice & Dice to accurately identify each recipient, correctly group records, and generate **personalized report slices** for secure, automated distribution.

CRMREPOSAPI Upload Slice & Dice Report

Tabular

Always select Details ONLY

Export View

Formatted Report
Export the report, including the report header, groupings, and filter settings.

Details Only
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format.xls Encoding: ISO-8859-1 (General US & Western Europe)

Cancel Export

5/24

Image 5

Export Report

Slice & Dice works exclusively with **Tabular Salesforce** reports exported in **Excel (Details Only)** format.

CRMREPORTS API Upload Slice & Dice Report

1st Email Recipient

6/24

Image 6

View of Exported Report

When a report is exported or run from Salesforce, the resulting spreadsheets shown here—including the **Email Address** column as the **first field** and is **sorted by that column**.

As a result, records are clearly grouped by **email address** within the Excel file, making the report ready for **Slice & Dice** processing.

Image 7

A **Slice & Dice** report may include **one or multiple recipients**, and the number of generated files adjusts dynamically based on the **unique email addresses** contained in the report.

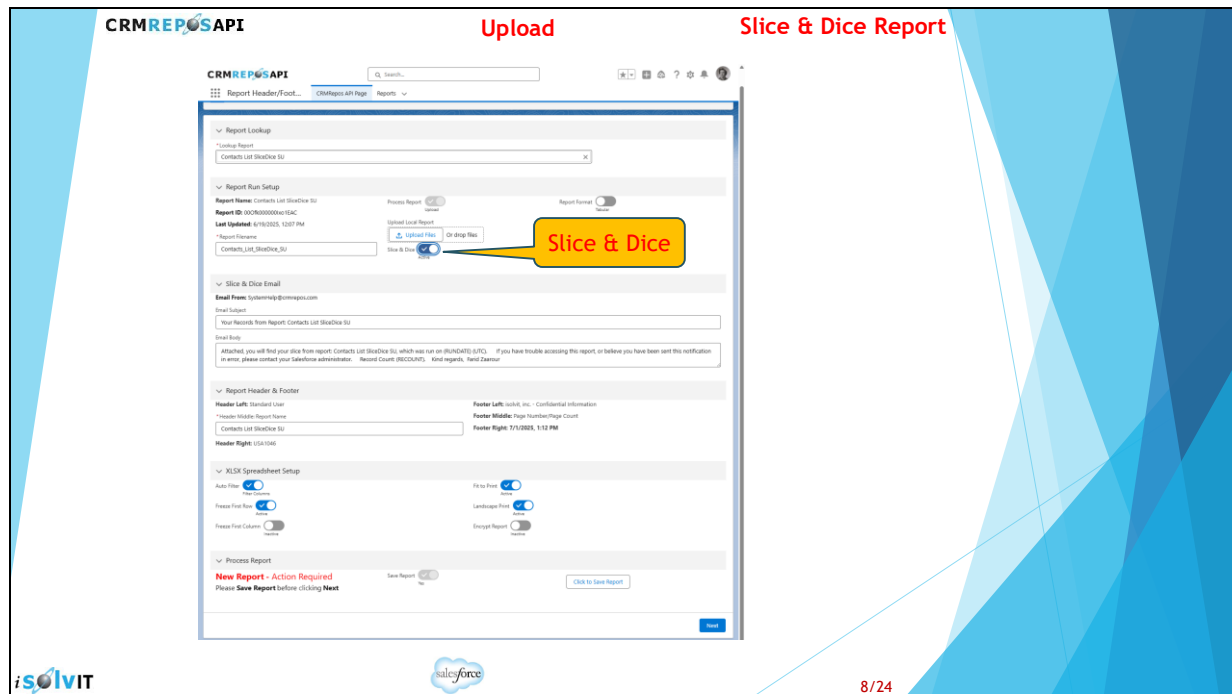


Image 8

Report Processing Page Overview

The screen is organized into **six sections**, each responsible for a specific part of the setup and processing workflow.

1. Report Lookup

Begin by selecting the Salesforce report you want to process. As you type in the **lookup field**, matching reports appear instantly.

After selecting a report and clicking **Get Selected Report**, all related sections become visible and the full configuration loads automatically.

To reset your selection at any time, click the “X” inside the lookup field. This clears the selected report and removes all displayed setup information.

2. Report Run Setup

This section displays the core metadata for the selected report, including the **original report name**, **Salesforce Report ID**, and the **last updated date**.

You may edit the **downloadable report file name** as needed.

Configure the following options:

- Set **Report Format** to **Tabular**
- Set **Process Report** to **Upload**
- **Drag and drop** the exported Salesforce **Excel (Details)** file into the upload area

Enable **Slice & Dice** by switching it to **Active**. When enabled, additional email configuration fields become available on this screen.

3. Slice & Dice Email

When **Slice & Dice** is enabled, a new section appears allowing you to define the **email message** used to distribute personalized report files.

This section includes two editable fields:

- **Email Subject**
- **Email Body**

The **Report Name** is automatically inserted into both fields by default.

The **Email Body** also supports two dynamic parameters:

- **Record Count** — the number of records included in the recipient's slice
- **Run Date (UTC)** the date and time the report was processed

These values are populated automatically at runtime, ensuring each recipient receives a personalized and context-aware message along with their report attachment.

4. Report Header & Footer

This section displays the complete **header and footer** that will be applied to the generated Excel file.

The template includes system-generated elements such as the **Salesforce instance name, export date, company name, and page numbering.**

The only editable field in this section is the **Report Name**, which can be adjusted to control how it appears in the final header.

5. Spreadsheet Setup

This section defines how the final spreadsheet will appear and print. CRMReposAPI supports:

- **Auto-Filter**
- **Freeze first row and/or first column**
- **Fit to Print**
- **Landscape orientation**
- Standard **Tabular layout** options

If additional security is required, you may enable the **Optional Encryption Setup**, which encrypts the final **XLSX** file using an encryption code you provide.

6. Process Report

At the bottom of the screen, CRMReposAPI indicates whether the configuration is **new** or **previously saved**.

If this is a new setup, or if any fields were modified, click **Save Report** to store your changes.

Once saved, click **Next** to process the report and generate the final, fully formatted **XLSX output**.

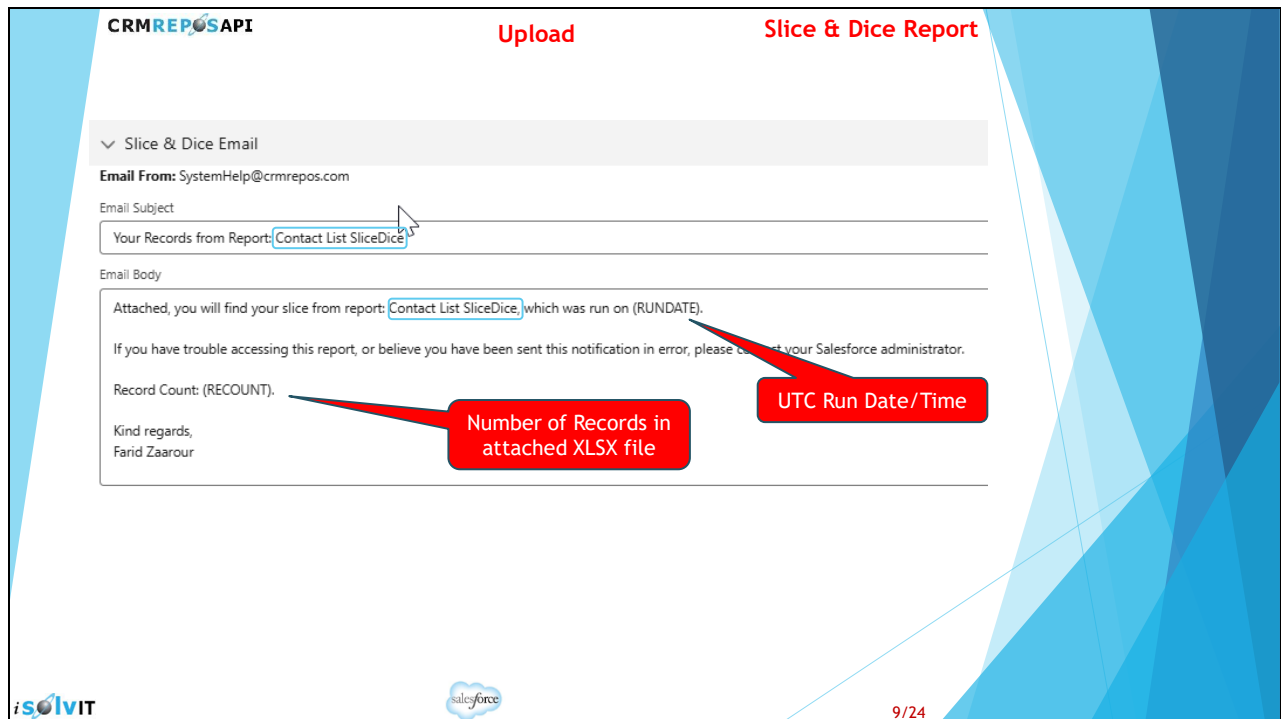


Image 9

Email Formatting

Slice & Dice dynamically calculates the **record count for each individual recipient** based on the data included in their specific report slice. Instead of using static or overall total, the system evaluates only the records assigned to each recipient and inserts the precise count into the **Email Body** at runtime.

This ensures that every recipient receives an accurate, context-aware message that reflects exactly how many records are included in their personalized report. By automating this calculation and insertion process, **Slice & Dice** eliminates manual counting, reduces the risk of errors, and reinforces clarity, trust, and professionalism in all report communications.

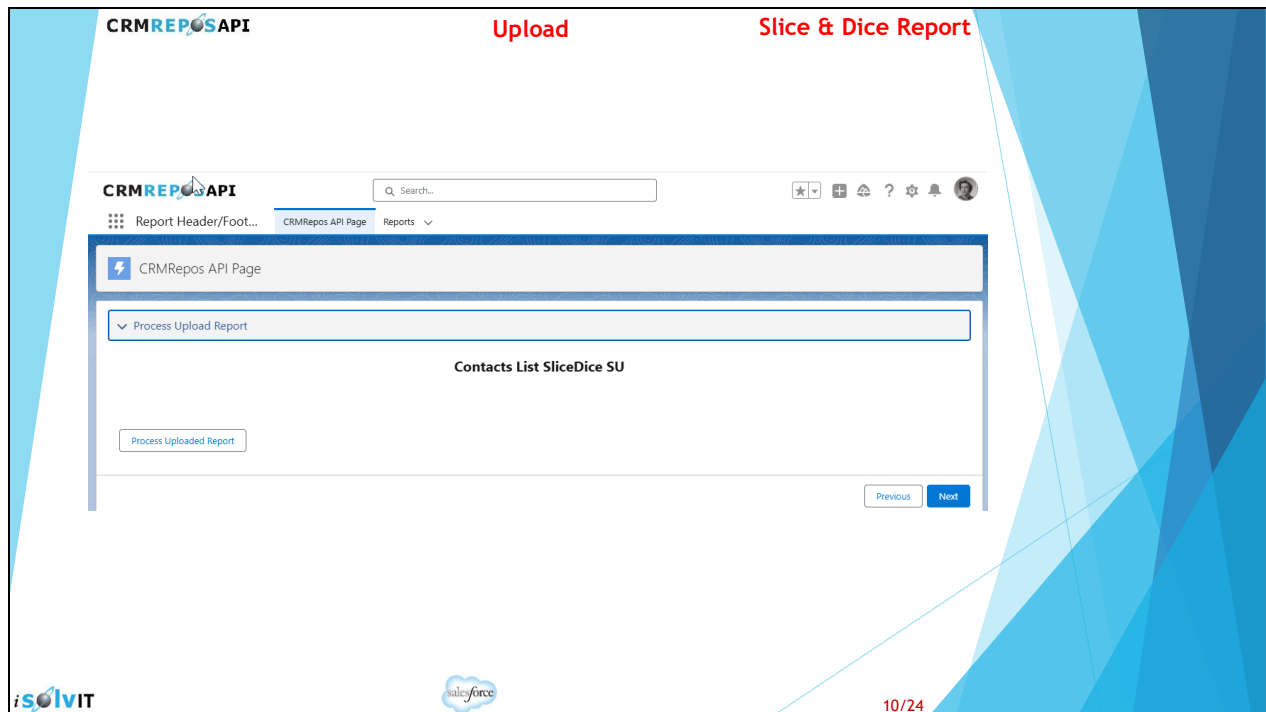


Image 10

Process Slice & Dice Report

If you proceed without saving your changes, **CRMReposAPI** will continue using the **previously saved configuration**. To apply any updates, click **Previous**, return to the setup screen, and **save your changes** before continuing.

Once everything is ready, click **Process Uploaded Report** to begin **Slice & Dice** delivery. Processing time may vary depending on the **number of recipients** and the **volume of records**.

When processing is complete, the next screen displays a **Download File** link, allowing you to retrieve the processed report.

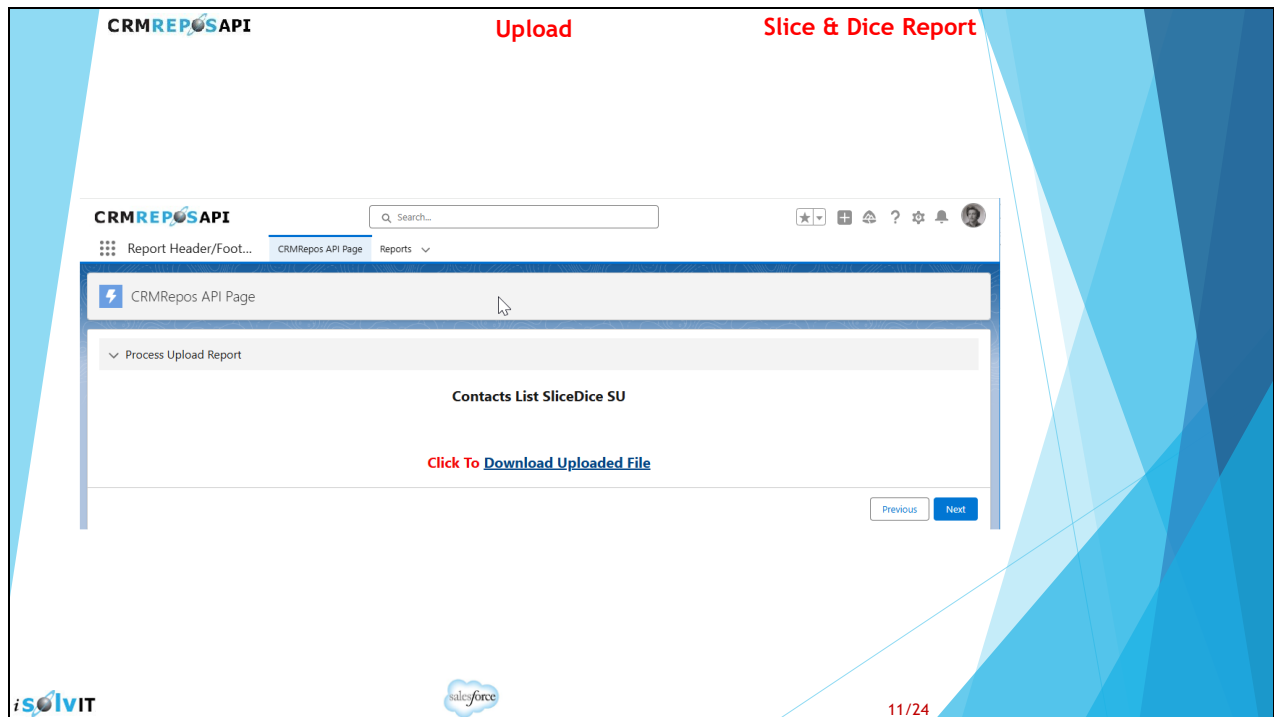


Image 11

Generation of the Master (Audit) Report

When you upload a file for **Slice & Dice**, CRMReposAPI first processes the **entire dataset exactly as provided**, without applying any recipient-based filtering.

Before any slicing occurs, CRMReposAPI generates and returns the **main report**—the complete, unsliced version of the data—formatted with the standard **header and footer** applied. This master report reflects the full contents of the uploaded file and serves as the authoritative version of the report.

Providing this fully formatted master copy ensures that you always retain a **clean, professional, and print-ready** version of the report for internal review, auditing, archiving, or compliance purposes, independent of the personalized reports distributed to individual recipients.

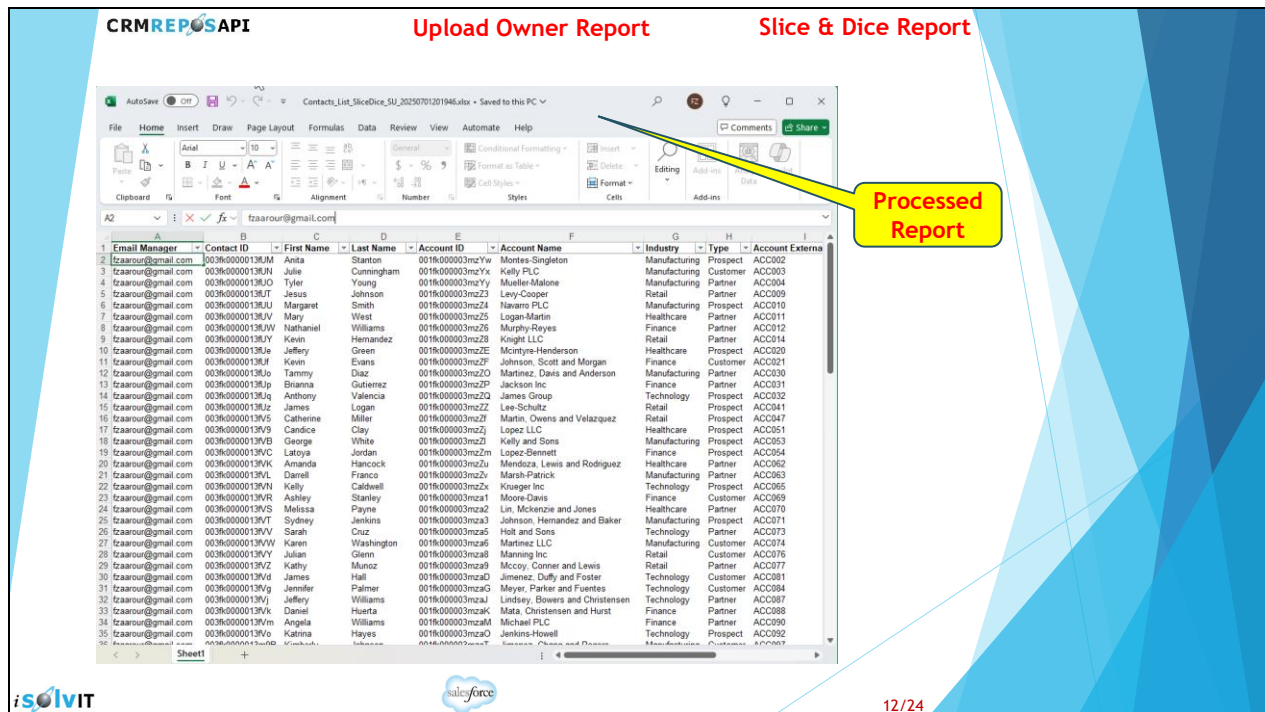


Image 12

Unsliced Report Processing

This is the processed report generated through CRMReposAPI. The output includes complete spreadsheet formatting, **frozen headers**, an **optimized layout**, and a **consistent structure** applied automatically.

To review how the report will appear when printed, open **File > Print Preview** to examine the final formatting and page layout (Next Screen).

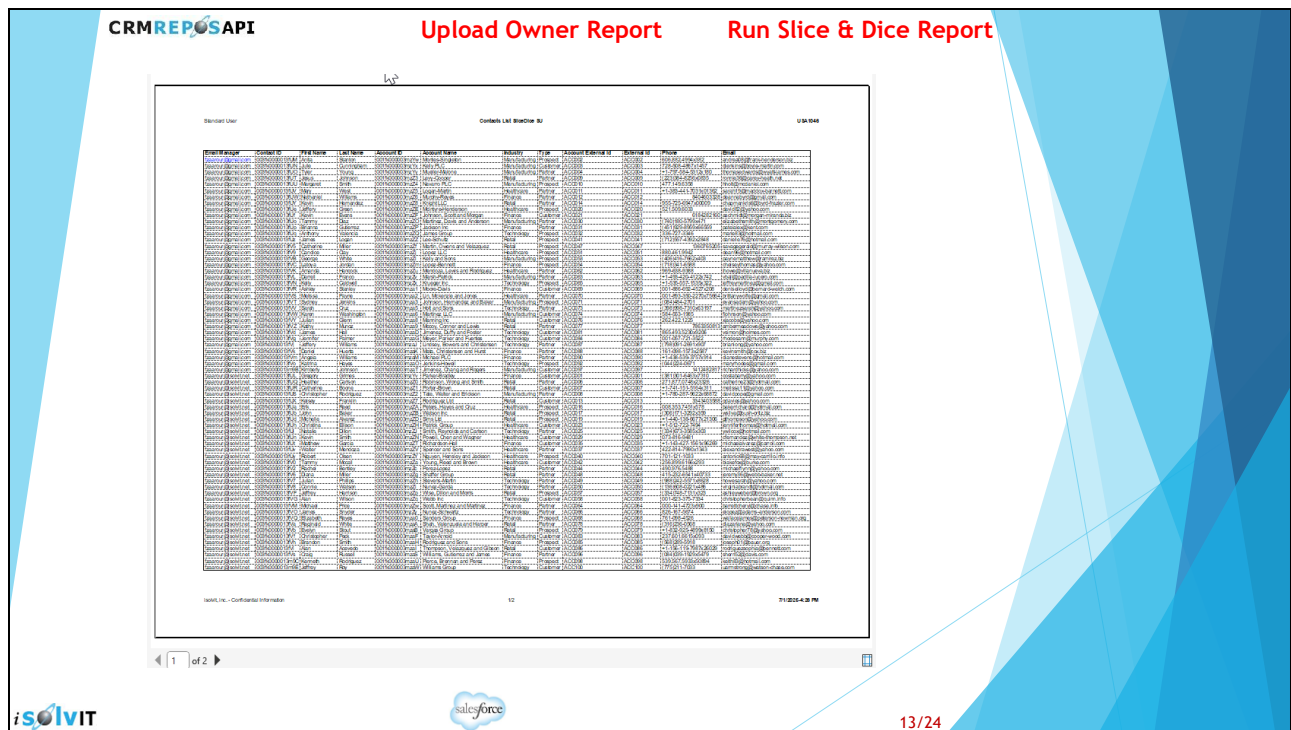


Image 13

Print Review

This screen summarizes the **formatting and processing details** applied after the report has been successfully generated.

The **header and footer** are created automatically using key Salesforce and user information, including the **user's full name, report title, organization instance, company name** with the “**Confidential Information**” label, **page numbering**, and the **report date**.

Together, these elements ensure a **professional, consistent, and compliance-ready layout** across all exported reports.

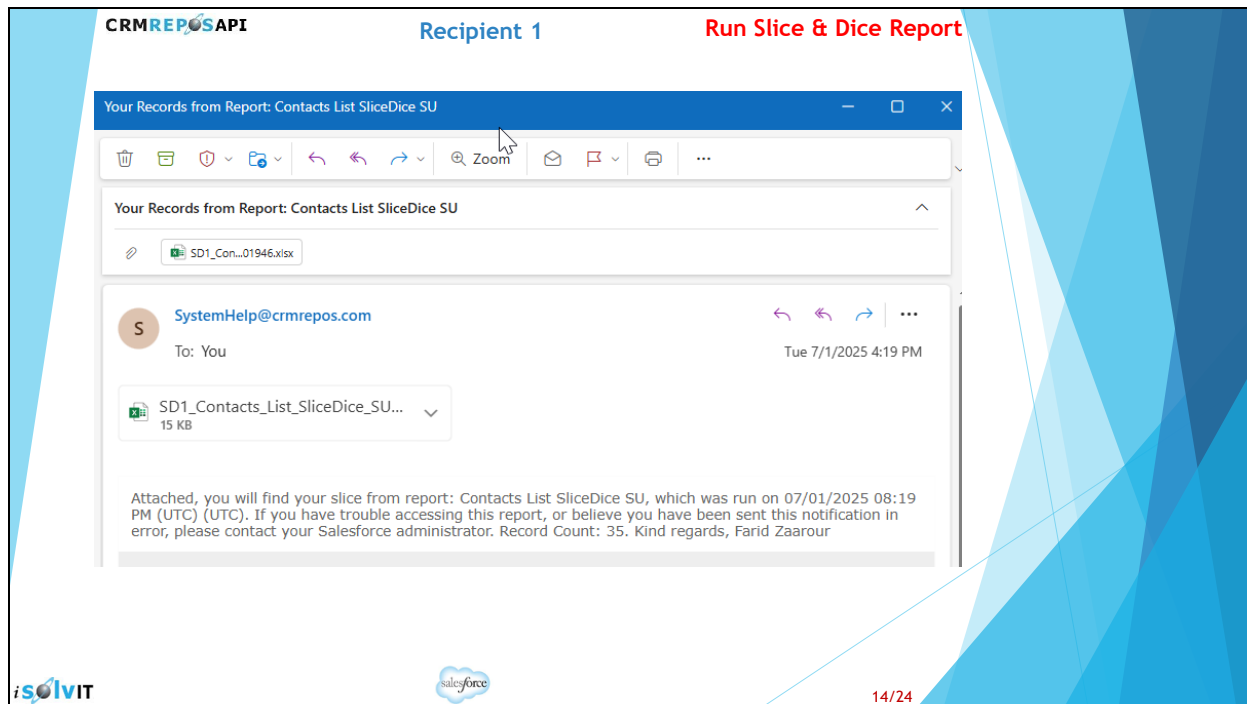


Image 14

Email Recipient 1

For each recipient, the email sent to their **Email Address** includes the following details:

Email From: SystemHelp@crmrepos.com — the same sender address used by **CRMRepos Job Scheduling**

Email To: The **email address** listed in the **first column** of the report

Attachment: The recipient's **sliced report file**

File Name: Begins with “SD_” followed by a sequential counter (1, 2, 3, 4, ...)

Email Subject: *Your Records from Report + Contacts List SliceDice SU*

Email Body: Includes the **Report Name**, **Record Count**, and **Run Date (UTC)**

Note: Both the **Email Subject** and **Email Body** are fully customizable on a per-report basis.

CRMREPOSAPI Recipient 1 Run Slice & Dice Report

Without Recipients Email

Slice & Dice

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id	External
003R0000013JUM	Stanton	Montes-Singleton	001R000003mzYw	Montes-Singleton	Manufacturing	Prospect	ACC002	ACC002
003R0000013JUN	June	Cunningham	001R000003mzYx	Kelly PLC	Manufacturing	Customer	ACC003	ACC003
003R0000013JUD	Tyler	Young	001R000003mzYy	Mueller-Malone	Manufacturing	Partner	ACC004	ACC004
003R0000013JUT	Jesus	Johnson	001R000003mzZ3	Levy-Cooper	Retail	Partner	ACC009	ACC009
003R0000013JUV	Margaret	Smith	001R000003mzZ4	Navarro PLC	Manufacturing	Prospect	ACC010	ACC010
003R0000013JUV	Mary	West	001R000003mzZ5	Logan-Martin	Healthcare	Partner	ACC011	ACC011
003R0000013JW	Nathaniel	Williams	001R000003mzZ6	Murphy-Royes	Finance	Partner	ACC012	ACC012
003R0000013JUY	Kevin	Hernandez	001R000003mzZ8	Knight LLC	Retail	Partner	ACC014	ACC014
003R0000013JUE	Jeffery	Green	001R000003mzZE	Mcintyre-Henderson	Healthcare	Prospect	ACC020	ACC020
003R0000013JUF	Kevin	Evans	001R000003mzZF	Johnson, Scott and Morgan	Finance	Customer	ACC021	ACC021
003R0000013JUL	Tammy	Diaz	001R000003mzZO	Martinez, Davis and Anderson	Manufacturing	Partner	ACC030	ACC030
003R0000013JUP	Brian	Gutierrez	001R000003mzZP	Jackson Inc.	Finance	Partner	ACC031	ACC031
003R0000013JUQ	Anthony	Valencia	001R000003mzZQ	James Group	Technology	Prospect	ACC032	ACC032
003R0000013JUZ	Logan	Miller	001R000003mzZI	Lee-Schultz	Retail	Prospect	ACC041	ACC041
003R0000013JVB	Candice	Clay	001R000003mzZJ	Lopez LLC	Healthcare	Prospect	ACC051	ACC051
003R0000013JVC	Latoya	White	001R000003mzZK	Kelly and Sons	Manufacturing	Prospect	ACC053	ACC053
003R0000013JVK	Ananda	Hancock	001R000003mzZm	Lopez-Bennett	Finance	Prospect	ACC054	ACC054
003R0000013JVL	Daniell	Franco	001R000003mzZu	Mendoza, Lewis and Rodriguez	Healthcare	Partner	ACC062	ACC062
003R0000013JVN	Kelly	Gallweil	001R000003mzZv	Marsh-Patrick	Manufacturing	Partner	ACC063	ACC063
003R0000013JVR	Ashley	Stanley	001R000003mzZx	Krueger Inc.	Technology	Prospect	ACC065	ACC065
003R0000013JVS	Melissa	Payne	001R000003mza1	Moore-Davis	Finance	Customer	ACC069	ACC069
003R0000013JVT	Sydney	Jenkins	001R000003mza2	Lin, McKenzie and Jones	Healthcare	Partner	ACC070	ACC070
003R0000013JVV	Sarah	Cruz	001R000003mza3	Johnson, Hernandez and Baker	Manufacturing	Prospect	ACC071	ACC071
003R0000013JWV	Karen	Washington	001R000003mza6	Holt and Sons	Technology	Partner	ACC073	ACC073
003R0000013JY	Julian	Glenn	001R000003mza8	Martinez LLC	Manufacturing	Customer	ACC074	ACC074
003R0000013JY7	Kathu	Munoz	001R000003mza9	Manning Inc	Retail	Partner	ACC076	ACC076
003R0000013JY7	Kathu	Munoz	001R000003mza9	Manning Inc	Retail	Partner	ACC077	ACC077

Ready Accessibility: Good to go Display Settings 100%

15/24

Image 15

Recipient 1 Report Slice

When you open the report file attached to the email, the **Email** column has been removed and the **first row is frozen**, making the report easier to read and navigate.

The report also includes the configured **header and footer**, along with all **Fit to Print** optimizations applied automatically. These include standardized page layout, proper scaling, and consistent formatting, ensuring the report is **print-ready, professional, and compliance-aligned** without requiring any manual adjustments.

Image 16

These optimizations include frozen headers for on-screen readability, **Fit to Print** scaling, consistent page layout, and standardized formatting. Together, they ensure that each recipient's report is **clear, professional, and print-ready**, without requiring any manual formatting or adjustments.

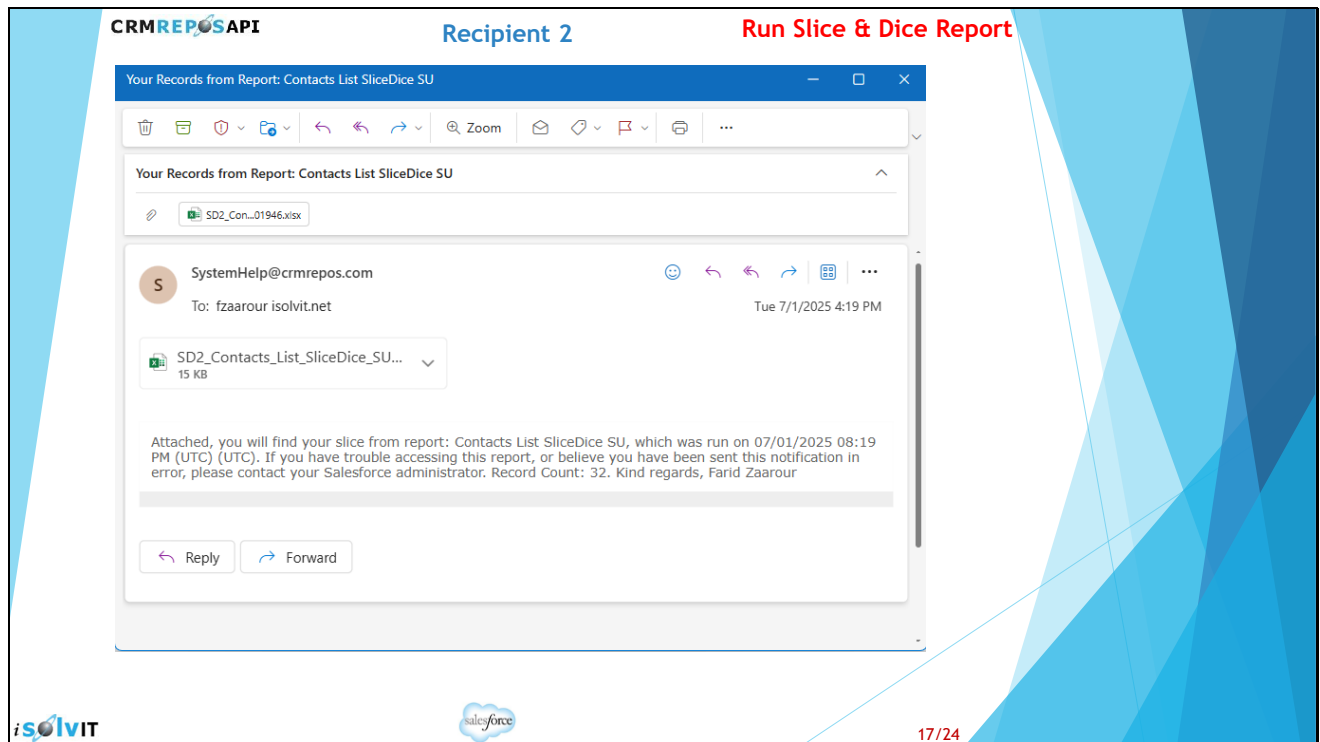


Image 17

Email Recipient 2

For each recipient, the email sent to their **Email Address** includes the following details:

Email From: SystemHelp@crmrepos.com — the same sender address used by **CRMRepos Job Scheduling**

Email To: The email address listed in the **first column** of the report

Attachment: The recipient's **sliced report file**

File Name: Begins with “SD_” followed by a sequential counter (1, 2, 3, 4, ...)

Email Subject: *Your Records from Report + Contacts List SliceDice SU*

Email Body: Includes the **Report Name**, **Record Count**, and **Run Date (UTC)**

Note: Both the **Email Subject** and **Email Body** are fully customizable on a per-report basis.

CRMREPOSAPI Recipient 2 Run Slice & Dice Report

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External ID	External ID
0038-0000013IUJ	Gregory	Geimes	001K-000003mzYv	Parker-Bradley	Finance	Customer	ACC001	ACC001
0038-0000013IUJ	Heather	Carlson	001K-000003mzZ0	Robinson, Wong and Smith	Retail	Partner	ACC006	ACC006
0038-0000013IUR	Catherine	Boone	001K-000003mzZ1	Porter-Brown	Retail	Customer	ACC007	ACC007
0038-0000013IUS	Christopher	Rodriguez	001K-000003mzZ2	Tate, Walter and Erickson	Manufacturing	Partner	ACC008	ACC008
0038-0000013IUX	Kelsey	Franklin	001K-000003mzZ7	Rodriguez Ltd	Retail	Customer	ACC013	ACC013
0038-0000013IUA	Enk	Reed	001K-000003mzZA	Peters, Hayes and Cruz	Healthcare	Prospect	ACC016	ACC016
0038-0000013IUB	John	Baker	001K-000003mzZB	Watson Inc	Retail	Prospect	ACC017	ACC017
0038-0000013IUD	Michelle	Alvarez	001K-000003mzZD	Sims Ltd	Retail	Prospect	ACC019	ACC019
0038-0000013IUH	Christina	Elison	001K-000003mzZH	Patrick Group	Healthcare	Customer	ACC023	ACC023
0038-0000013IUI	Natalie	Dillon	001K-000003mzZJ	Smith, Reynolds and Carlson	Technology	Partner	ACC025	ACC025
0038-0000013IUL	Kevin	Smith	001K-000003mzZK	Powell, Chen and Wagner	Healthcare	Customer	ACC029	ACC029
0038-0000013IUM	Matthew	Garcia	001K-000003mzZT	Richardson-Hall	Finance	Customer	ACC035	ACC035
0038-0000013IUV	Walter	Mendoza	001K-000003mzZV	Spencer and Sons	Healthcare	Partner	ACC037	ACC037
0038-0000013IUY	Robert	Olsen	001K-000003mzZy	Nguyen, Hensley and Jackson	Healthcare	Prospect	ACC040	ACC040
0038-0000013IV0	Tammy	Mccall	001K-000003mzZa	Young, Reed and Brown	Healthcare	Customer	ACC042	ACC042
0038-0000013IV2	Rachel	Bentley	001K-000003mzZc	Perez-Lopez	Retail	Partner	ACC044	ACC044
0038-0000013IV6	Diana	Miller	001K-000003mzZg	Shaffer Group	Retail	Partner	ACC048	ACC048
0038-0000013IV7	Julian	Phillips	001K-000003mzZh	Stevens-Martin	Technology	Partner	ACC049	ACC049
0038-0000013IV8	Connie	Watson	001K-000003mzZi	Nunez-Garcia	Technology	Partner	ACC050	ACC050
0038-0000013IVF	Jeffrey	Harrison	001K-000003mzZp	Wise, Dillon and Morris	Retail	Prospect	ACC057	ACC057
0038-0000013IVG	Alan	Wilson	001K-000003mzZq	Webb Inc	Technology	Customer	ACC058	ACC058
0038-0000013IVM	Michael	Price	001K-000003mzZr	Scott, Martinez and Martinez	Finance	Partner	ACC064	ACC064
0038-0000013IVO	James	Snyder	001K-000003mzZy	Nunez-Schwartz	Technology	Partner	ACC066	ACC066
0038-0000013IVQ	Elizabeth	Reyes	001K-000003mzZa0	Sanders Group	Finance	Prospect	ACC068	ACC068
0038-0000013IVa	Reginald	White	001K-000003mzZaA	Shah, Valenzuela and Harper	Retail	Partner	ACC078	ACC078
0038-0000013IVb	Evelyn	Stout	001K-000003mzZaB	Vargas Group	Retail	Prospect	ACC079	ACC079
0038-0000013IVM	Christopher	Peck	001K-000003mzZaF	Taylor-Arnold	Manufacturing	Customer	ACC083	ACC083
0038-0000013IVH	Brandon	Smith	001K-000003mzZaH	Rodriguez and Sons	Finance	Prospect	ACC085	ACC085
0038-0000013IVi	Alan	Acevedo	001K-000003mzZaI	Thompson, Velazquez and Gibson	Retail	Customer	ACC086	ACC086
0038-0000013IVs	Craig	Russell	001K-000003mzZaS	Williams, Gutierrez and James	Finance	Partner	ACC096	ACC096
0038-0000013IVC	Kenneth	Rodriguez	001K-000003mzZaU	Pierce, Brennan and Perez	Finance	Prospect	ACC098	ACC098
0038-0000013IVe	Jeffrey	Roy	001K-000003mzZaV	Williams Group	Technology	Customer	ACC100	ACC100

Image 18

Recipient 2 Report Slice

When you open the report file attached to the email, the **Email** column has been removed and the **first row is frozen**, making the report easier to read and navigate.

The report also includes the configured **header and footer**, along with all **Fit to Print** optimizations applied automatically. These include standardized page layout, proper scaling, and consistent formatting, ensuring the report is **print-ready, professional, and compliance-aligned** without requiring any manual adjustments.

Image 19

22 / 29

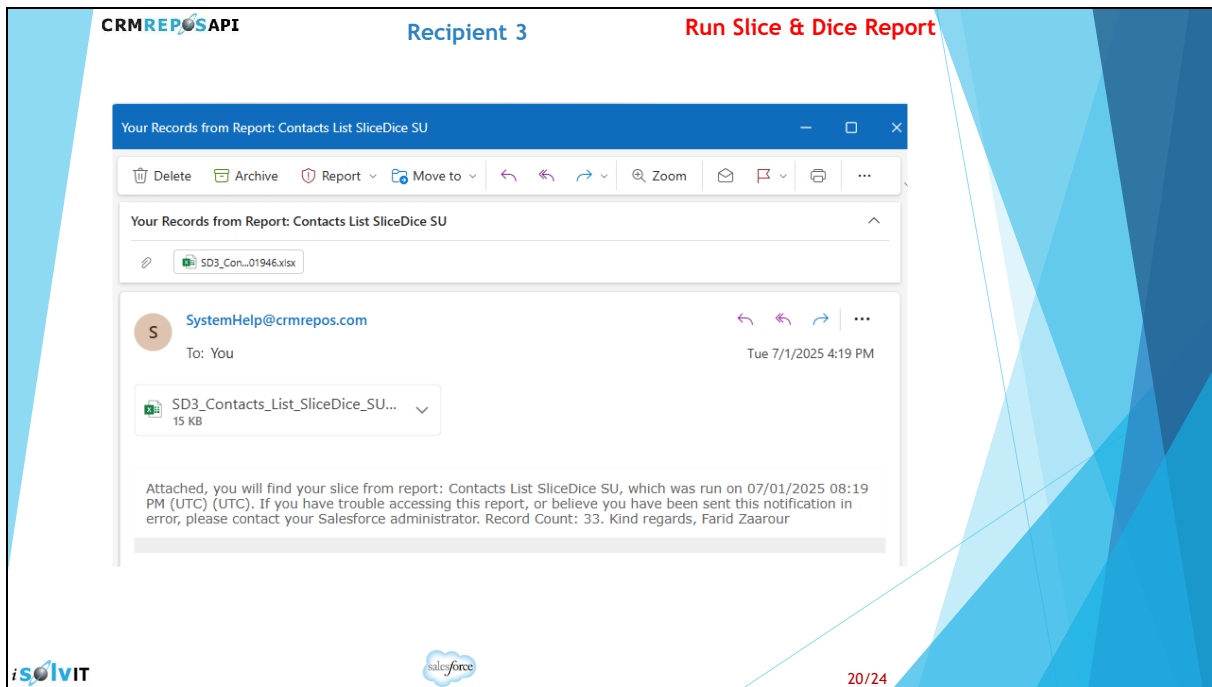


Image 20

Email Recipient 3

For each recipient, the email sent to their **Email Address** includes the following details:

Email From: SystemHelp@crmrepos.com — the same sender address used by **CRMRepos Job Scheduling**

Email To: The **email address** listed in the **first column** of the report

Attachment: The recipient's **sliced report file**

File Name: Begins with “SD_” followed by a sequential counter (1, 2, 3, 4, ...)

Email Subject: *Your Records from Report + Contacts List SliceDice SU*

Email Body: Includes the **Report Name**, **Record Count**, and **Run Date (UTC)**

Note: Both the **Email Subject** and **Email Body** are fully customizable on a per-report basis.

CRMREPOSAPI Recipient 3 Run Slice & Dice Report

Slice & Dice

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id	External Id
0039k0000013RUP	John	Strickland	0019k000003mzVZ	Dennis, Buchanan and Martinez	Technology	Customer	ACC015	ACC015
0039k0000013RUJ	Tracy	Ruiz	0019k000003mzZ9	Boyd, Dickson and Perez	Manufacturing	Partner	ACC018	ACC018
0039k0000013RUc	Debra	Smith	0019k000003mzZC	Gonzalez Lee	Finance	Prospect	ACC022	ACC022
0039k0000013RUg	Jill	Panons	0019k000003mzZG	Frank, Gomez and Andrews	Technology	Customer	ACC024	ACC024
0039k0000013RUl	Paul	Hernandez	0019k000003mzZl	Cooper Group	Finance	Customer	ACC026	ACC026
0039k0000013RUK	Heather	Arellano	0019k000003mzZK	Ellis, Odom and Holloway	Manufacturing	Customer	ACC027	ACC027
0039k0000013RUl	Philip	Garcia	0019k000003mzZL	Franklin Ltd	Finance	Partner	ACC028	ACC028
0039k0000013RUn	Kelly	Schultz	0019k000003mzZM	French-Garcia	Manufacturing	Partner	ACC033	ACC033
0039k0000013RUj	John	Cole	0019k000003mzZR	Higgins-Shelton	Finance	Customer	ACC034	ACC034
0039k0000013RUj	Halley	Smith	0019k000003mzZS	Hall, Jones and Williams	Finance	Partner	ACC036	ACC036
0039k0000013RUj	Ricardo	Wright	0019k000003mzZU	Cooper Group	Finance	Partner	ACC038	ACC038
0039k0000013RUj	Matthew	White	0019k000003mzZW	Crawford, Jennings and McDaniel	Manufacturing	Prospect	ACC039	ACC039
0039k0000013RUj	Stephen	Taylor	0019k000003mzZX	Holland, Turner and Jimenez	Finance	Prospect	ACC043	ACC043
0039k0000013RUY	Jeremy	White	0019k000003mzZb	Franco, Williams and Banks	Technology	Partner	ACC045	ACC045
0039k0000013RUV	Donna	Leonard	0019k000003mzZd	Davis and Sons	Finance	Partner	ACC046	ACC046
0039k0000013RVA	Vanessa	Walker	0019k000003mzZe	Davis LLC	Healthcare	Partner	ACC052	ACC052
0039k0000013RVD	Michael	Rodriguez	0019k000003mzZk	Brewer Ltd	Healthcare	Customer	ACC055	ACC055
0039k0000013RVE	Elizabeth	Adkins	0019k000003mzZn	Baker, Lette and Rubio	Manufacturing	Customer	ACC056	ACC056
0039k0000013RVE	Diane	Aula	0019k000003mzZo	Brown-Jenkins	Manufacturing	Partner	ACC059	ACC059
0039k0000013RVH	Neil	Brown	0019k000003mzZr	Elliott Ltd	Retail	Prospect	ACC060	ACC060
0039k0000013RVl	Drew	Ramez	0019k000003mzZs	Bradford PLC	Finance	Customer	ACC061	ACC061
0039k0000013RVJ	Jeremiah	Ayala	0019k000003mzZt	Gonzalez LLC	Finance	Customer	ACC067	ACC067
0039k0000013RVP	Jamie	Arroyo	0019k000003mzZz	Hinton, Coleman and Chambers	Retail	Partner	ACC072	ACC072
0039k0000013RVU	Katie	Castillo	0019k000003mzZa	Franklin Ltd	Manufacturing	Customer	ACC075	ACC075
0039k0000013RVV	Anthony	Martinez	0019k000003mzZf	Grier Inc	Retail	Customer	ACC080	ACC080
0039k0000013RVc	David	Burns	0019k000003mzZg	Bradley, Lee and Camacho	Manufacturing	Prospect	ACC082	ACC082
0039k0000013RVe	Ananda	Espinosa	0019k000003mzZaE	Clark-Robbins	Manufacturing	Partner	ACC089	ACC089
0039k0000013RVf	Mark	Maxwell	0019k000003mzZaF	Blecker Group	Technology	Partner	ACC091	ACC091
0039k0000013RVn	Brian	Smith	0019k000003mzZaN	Adams Group	Retail	Customer	ACC093	ACC093
0039k0000013RVp	Gary	Mitchell	0019k000003mzZaP	Daniels, Banks and Welch	Retail	Prospect	ACC094	ACC094
0039k0000013RVq	David	Smith	0019k000003mzZaQ	Brown Inc	Healthcare	Prospect	ACC095	ACC095
0039k0000013RVr	Carlos	Bennett	0019k000003mzZaR	Fleming, Carroll and Manning	Healthcare	Customer	ACC099	ACC099
0039k0000013RVd	Kathy	Oconnell	0019k000003mzZaV	Banks Inc	Finance	Prospect	ACC099	ACC099

Image 21

Recipient 3 Report Slice

When you open the report file attached to the email, the **Email** column has been removed and the **first row is frozen**, making the report easier to read and navigate.

The report also includes the configured **header and footer**, along with all **Fit to Print** optimizations applied automatically. These include standardized page layout, proper scaling, and consistent formatting, ensuring the report is **print-ready, professional, and compliance-aligned** without requiring any manual adjustments.

Image 22

Any report generated through **Slice & Dice** automatically includes the configured **header and footer**, along with all **printing and reading optimizations** applied by CRMReposAPI.

25 / 29

CRMREPOSAPI

App - CRMRepos API Page

1. **Search for Report Name**
 - In the search bar, enter the name of the report you wish to process.
2. **Get the Selected Report**
 - Click the **Get Selected Report** button to load the report configuration.
3. **Switch the following**
 - Process Report: to **Run**
 - Report Records: option **“Up To Two K”** or **“Two K Plus”** depend on report’s records
4. **Slice & Dice Check**
 - Edit Email Subject and Body
5. **Save the Report**
 - If you are adding a new report or updating an existing one, **Click to Save Report** to store the uploaded file.
6. **Proceed**
 - Click the **Next** button to continue.

Run Slice & Dice Report

Run Function Require CRMRepos Subscription Which Requires:

- Master Login
- Security Permission
- External Client Setup

Trusted IP: 20.119.16.11

Process Run Report

1. **Process the Run Report**
 - Click on **Run Report URL** to begin processing the Run data.
2. **Download the Processed File**
 - Once processing is complete, click **Click To Download Run File** to download the processed report.

iSOLVIT **salesforce** 23/24

Image 23

Run Report Capability in CRMReposAPI

Instead of navigating to Salesforce to open a report, manually running it, exporting the file, and then uploading it into the application, CRMReposAPI provides a built-in **Run Report** capability.

Originally introduced in **CRMRepos (Report Job Scheduler)** and now inherited by CRMReposAPI, this functionality allows Salesforce reports to be executed directly from within the application.

The report is automatically run, downloaded, and delivered as a fully formatted Excel file with all configured enhancements applied.

These enhancements include headers and footers, print optimization, optional encryption, and any additional processing rules defined in the setup.

Security and Access Requirements

The **Run Report** feature requires a **Master Login** with the appropriate Salesforce permissions.

Once this access is configured and explicitly approved, authorized users can use the feature without needing individual elevated permissions.

Scheduling and Subscription Benefits

A **CRMRepos subscription** enables Salesforce reports to be scheduled to run automatically and delivered to designated recipients.

If your organization already has an active CRMRepos subscription, there is no additional cost to use the **Run Report** capability within the CRMReposAPI Flow.

CRMREPOSAPI Run Slice & Dice Report

Report Lookup
*Lookup Report
Contact List SliceDice

Report Run Setup
Report Name: Contact List SliceDice
Report ID: 100x000007124546
Last Updated: 5/22/2023, 1:28 PM
*Report Filename
Contact_List_SliceDice
Process Report: ☒ On
Slice & Dice: ☒ Active
Report Format: ☐ HTML
Report Records: ☐ up to 1000

Slice & Dice Email
Email From: System@iSolvIT.com
Email Subject: Your Records from Report: Contact List SliceDice
Email Body: Attached, you will find your slice from report Contact List SliceDice, which was run on (RUNDATE).

Report Header & Footer
Header Left: Hand Zaaroor
Header Middle: Report Name
Contact List SliceDice
Header Right: USAR2
Footer Left: iSolvIT, Inc. - Confidential Information
Footer Middle: Page Number/Page Count
Footer Right: 276/2825, 11:22 AM

XLSX Spreadsheet Setup
Auto Filter: ☒ On
Process Print Row: ☒ On
Process Print Column: ☐ Inactive
Strip Print: ☒ On
Landscape Print: ☒ On
Encrypt Report: ☐ Inactive

Process Report
New Report - Action Required
Please **Save Report** before clicking **Next**
Save Report: ☐ [Click to Save Report](#)

Next

iSOLVIT Salesforce 24/24

Image 24

Formatted Run vs. Upload Report Processing

The **Formatted Run** screen functions identically to the **Upload Report** screen in terms of layout, configuration options, and processing behavior. All setup sections, formatting rules, header and footer application, print optimization, encryption options, and output generation remain the same.

The only functional difference is the **Process Report** setting:

- **Upload Report:**

The user manually runs the report in Salesforce, exports it as a Formatted XLSX file, and uploads the file into CRMReposAPI for processing.

- **Run Report:**

CRMReposAPI executes the Salesforce report directly from within the application, retrieves the data automatically, and processes it using the same formatting and configuration rules.

Once **Process Report** is set to **Run** instead of **Upload**, the system handles report execution, retrieval, and formatting end to end, without requiring manual interaction in Salesforce.

In both cases, the final output is generated as a fully formatted, print-ready Excel file with consistent headers and footers, optimized layout, optional encryption (if enabled), and all previously saved processing rules applied.