

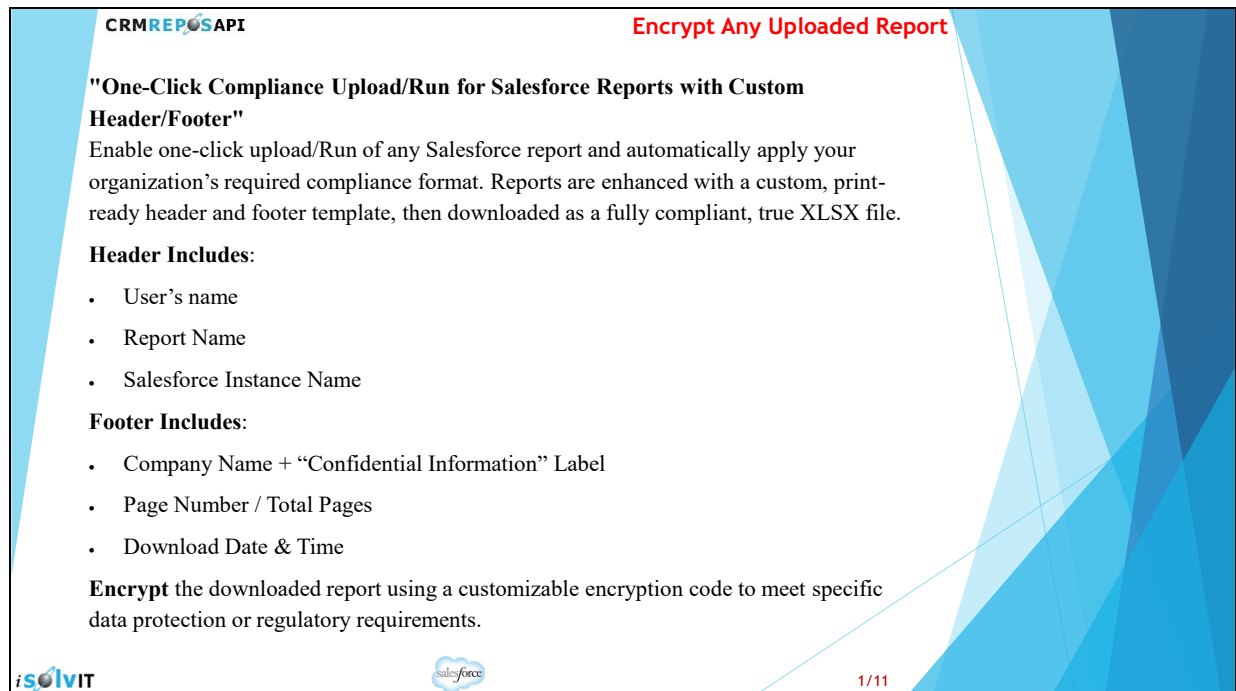


Image 1

Tabular and Formatted Report Processing with Encryption

CRMReposAPI enables organizations to enhance Salesforce **Tabular** and **Formatted** Reports by converting them into clean, professionally formatted, print-ready Excel files—while preserving the report's raw data integrity, column structure, and analytical meaning.

The Tabular and Formatted Report workflows are designed for reports that prioritize accurate data extraction, analysis, and downstream processing. CRMReposAPI augments these reports with standardized headers and footers, consistent formatting, and Excel-specific layout optimizations, producing outputs that are easy to review, share, and print.

Optional Encryption Setup

For reports containing sensitive or confidential data, CRMReposAPI provides an optional encryption step during processing.

When **Encryption** is enabled:

1. The user specifies an encryption password during the Spreadsheet Setup phase.
2. CRMReposAPI applies native Microsoft Excel encryption to the generated XLSX file at the time of report creation.
3. The encrypted file can only be opened by users who know the password, protecting the report at rest and during distribution.

This encryption process uses Excel's built-in security mechanisms and does not alter the report data, formatting, or structure. All headers, footers, layout optimizations, and processing rules remain fully intact.

Header and Footer Overview

This section outlines how each part of the header and footer is automatically generated—and where every piece of information originates.

Header

Left: The user's *full name* (retrieved from Salesforce user information).

Middle: The *Report Name* (taken directly from the uploaded or selected Salesforce report).

Right: The *Salesforce Org Instance Name* (automatically detected from the connected org).

Footer

Left: The user's *Company Name* combined with the required “**Confidential Information**” label.

Middle: *Page Number / Total Page Count* (generated dynamically when the XLSX is created).

Right: The *Export Date* (timestamp applied at the moment the report is formatted).

Resulting Output

The final output is a professionally formatted, print-ready, and optionally encrypted Excel file that meets security, compliance, and presentation requirements—without requiring manual intervention or post-processing.

CRMREPOSAPI

Export the Report **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(x).

Process Uploaded Report

1. Process the Uploaded Report
 - Click on **Process Uploaded Report** to begin processing the uploaded data.
2. Download the Processed File
 - Click To Download Uploaded File; Non-Encrypted report.
3. Email sent with Encrypted Report

Encrypt Any Uploaded Report

App - CRMRepos API Page **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. Encrypt Steps
 - Check **Encrypt Report**
 - Enter **Encryption Code**
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.

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Image 2

Processing Tabular and Formatted Salesforce Reports with Encryption

This screen outlines the complete end-to-end workflow for processing any **Tabular** or **Formatted** Salesforce report using CRMReposAPI. The process begins in Salesforce, where the user runs the desired report and exports it in Excel format using a clear, descriptive filename for traceability.

Step 1: Select the Report

Use the smart lookup field to search for the report by name. Once the intended report is selected, click **Get Selected Report** to retrieve all previously saved settings and configurations associated with that report.

Step 2: Upload and Configure the Report

Drag and drop the exported **Details** or **Formatted** Excel file into the upload area.

Configure the following options:

- Enable **Encrypt Report**, if required, and enter an **Encryption Code**
- Set the **Report Format** to **Tabular** or **Formatted** to ensure CRMReposAPI applies the correct header, footer, and formatting logic

If you are creating a new setup or updating an existing report, click **Save**, then click **Next** to continue.

Step 3: Process the Report

Click **Process Uploaded Report** to begin processing.

CRMReposAPI reads the uploaded data, applies all configured formatting and security rules, and generates the final XLSX file.

Step 4: Download the Final Excel File

When processing is complete, **Click To Download Uploaded File** to download the finished Excel report.

The resulting file is fully formatted, print-ready, and compliant, with all selected headers, footers, layout optimizations, and optional encryption applied—without requiring any manual cleanup.

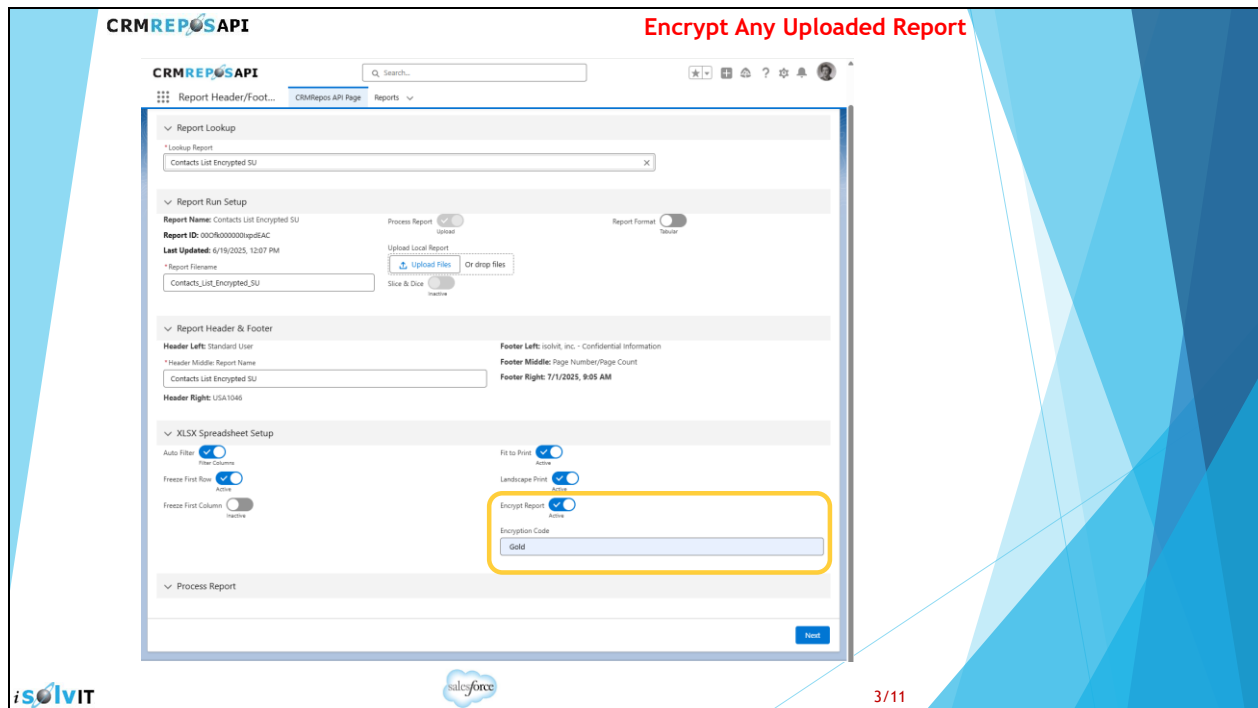


Image 3

CRMReposAPI Tabular Report Processing Page Overview

This page guides you through every step required to prepare, configure, and process an uploaded **Salesforce Tabular (Details)** report using CRMReposAPI. The screen is organized into five distinct sections, each handling 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 automatically loads.

To reset your selection at any time, click the “X” icon inside the lookup field. This clears the selected report and removes all displayed setup information, returning the page to its initial state.

2. Report Run Setup

This section displays the core metadata for the selected report, including:

- Original report name
- Salesforce Report ID
- Date the setup was last updated

From this section, you can:

- Edit the downloadable report filename
- Set the **Report Format** to **Tabular**
- Drag and drop the exported Salesforce **Details (.XLSX)** file into the upload area

3. 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:

- Salesforce org instance name
- Export date and time
- Company name
- Page numbering

The only editable field in this section is the **Report Name**, which you may adjust if you want it to appear differently in the final report header.

4. Spreadsheet Setup

In this section, you define how the final spreadsheet will appear and print.

CRMReposAPI supports the following options:

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

If additional security is required:

- Enable **Encrypt Report**
- Enter an **Encryption Code** to encrypt the final XLSX file

5. Process Report

At the bottom of the screen, CRMReposAPI indicates whether the current configuration is a new report setup or an existing one.

If you are creating a new configuration or have modified any fields, click **Save Report** to store your changes. Once saved, click **Next** to proceed.

On the following screen, click **Process Uploaded Report** to generate the final XLSX output.

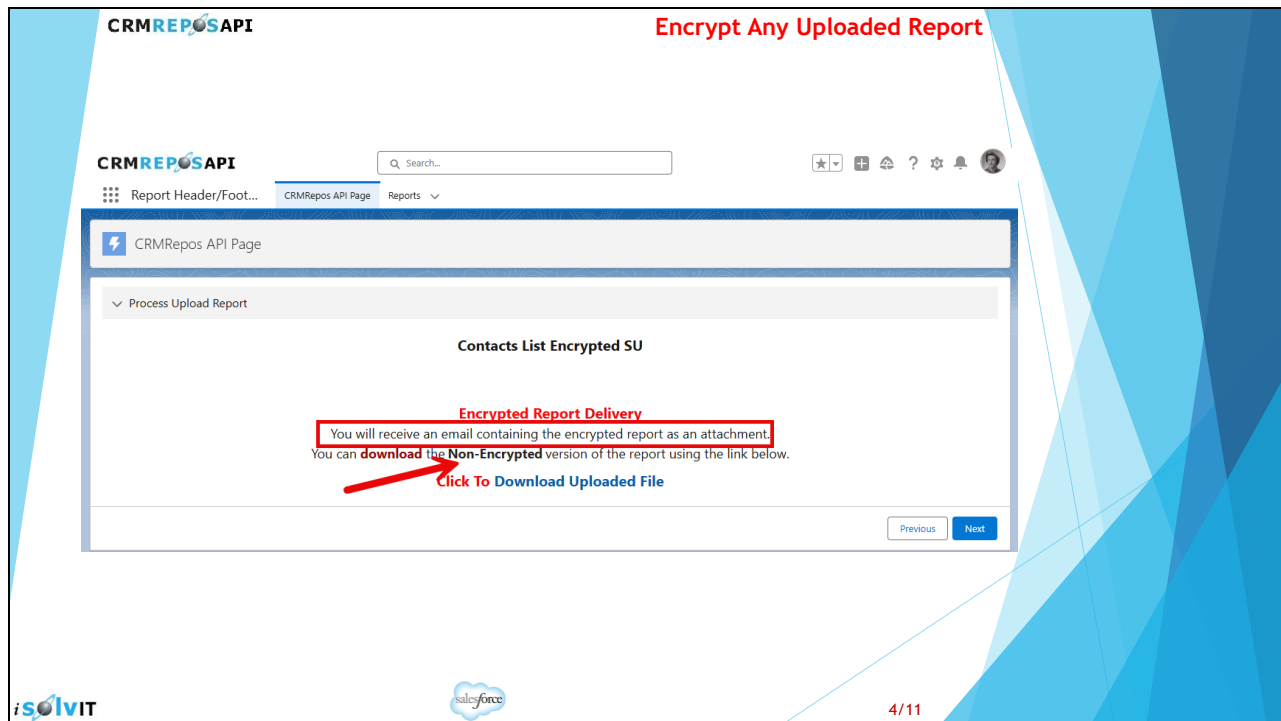


Image 4

Encrypted Report Delivery Workflow

When a report is processed with **encryption enabled**, CRMReposAPI automatically sends the user an **encrypted copy of the report as an email attachment**. This ensures secure distribution of sensitive data and supports compliance with data protection and privacy requirements.

For added convenience, the system also provides a **non-encrypted version** of the same report for immediate download using the link displayed on the screen. This allows users to quickly access the formatted report for on-screen review or internal use, while ensuring the encrypted version is securely delivered via email.

Security and Usability Balance

By offering encrypted report in email delivery alongside immediate access to a non-encrypted file when appropriate, CRMReposAPI balances strong security controls with practical usability.

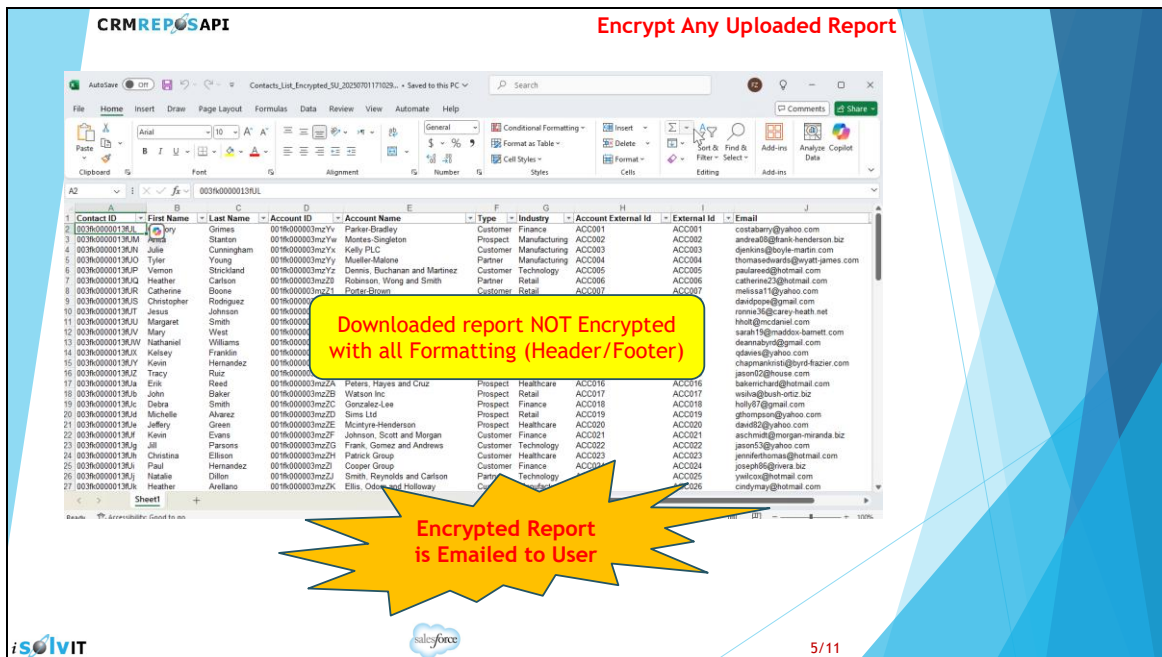


Image 5

Non-Encrypted Download Confirmation

This screen confirms that the report downloaded directly from the application is **not encrypted**. The file is provided for immediate access and review, with all formatting, headers, footers, and print settings fully applied.

The **encrypted version** of the same report is delivered separately via email. Keeping the on-screen download unencrypted allows for quick access and usability, while encrypted email delivery ensures secure distribution of sensitive data.

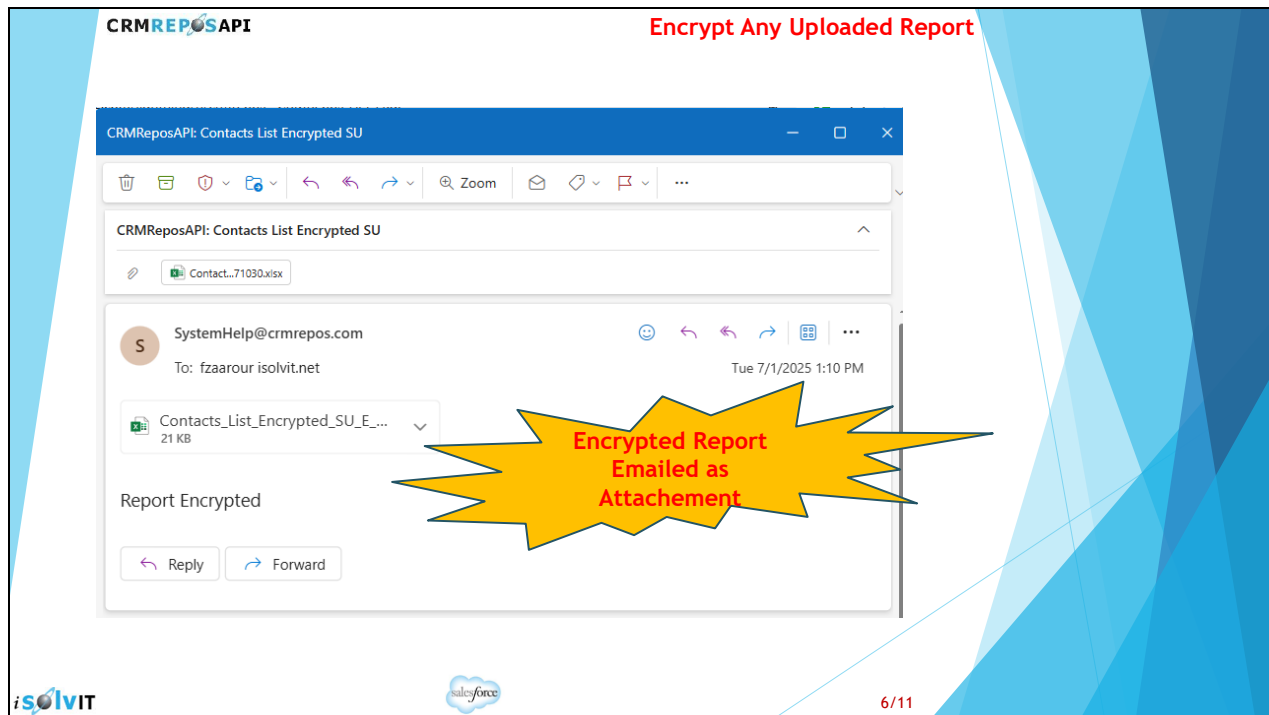


Image 6

Encrypted Report Email Delivery

This image demonstrates how CRMReposAPI delivers an encrypted report via email.

When a report is processed with **encryption enabled**, the system automatically sends the user an email containing the **encrypted XLSX file as an attachment**. The message clearly indicates that the report has been encrypted, confirming that the data is protected during delivery.

This automated process ensures secure distribution of sensitive information while maintaining a simple, efficient workflow for the user—no manual steps are required after processing.

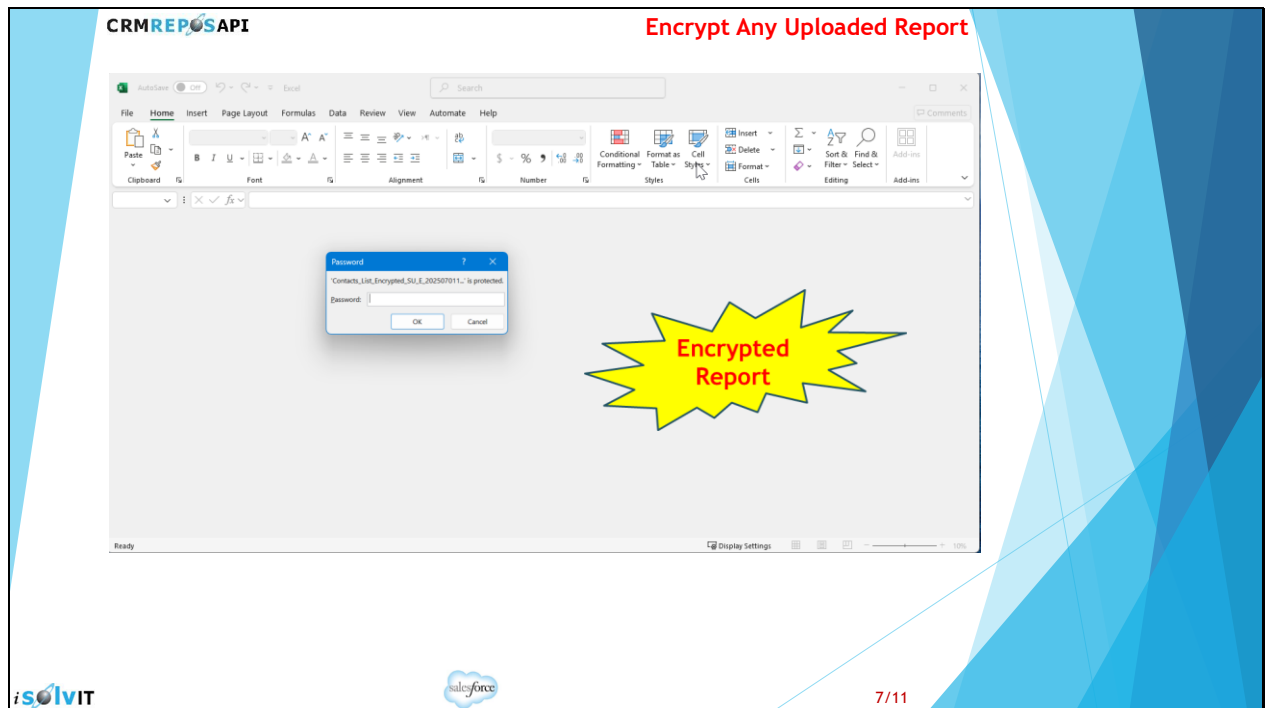


Image 7

Opening an Encrypted Excel Report

When opening an encrypted Excel file generated by CRMReposAPI, the system prompts the user to enter the **Encryption Code**.

This code is the security key applied during report processing and is required to unlock and view the report's contents. Only users who have the correct encryption code can access the file, ensuring the secure handling of sensitive or regulated data.

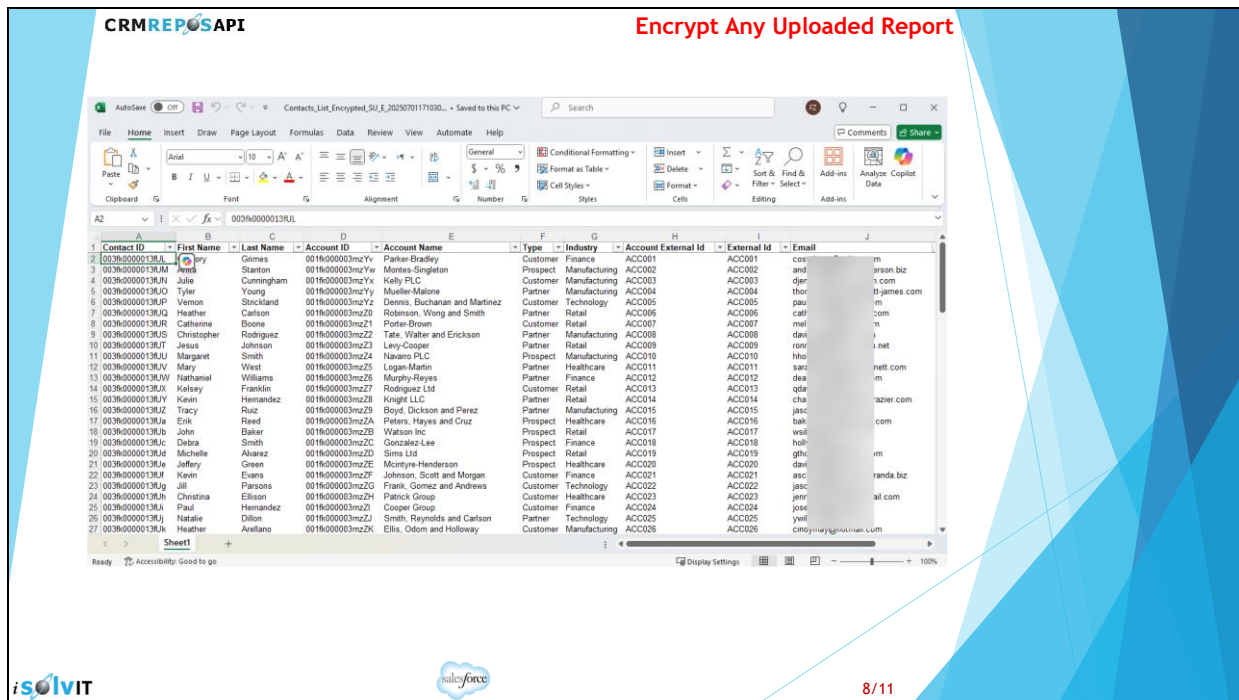


Image 8

Viewing an Encrypted Excel Report

When you open an encrypted Excel file, you are prompted to enter the **Encryption Code**. Once the correct code is entered, the report unlocks and displays normally.

All formatting applied by CRMReposAPI is fully preserved, including:

- Custom headers and footers
- Page numbers/Total Pages
- Landscape print orientation
- **Fit to Print** scaling
- Repeated column headers

Even when encrypted, the report maintains the complete, professional formatting generated by CRMReposAPI, ensuring both security and presentation quality.

Header Configuration

The following header elements are applied automatically:

- **Left:** User's full name (retrieved from Salesforce user information)
- **Center:** Report name (taken directly from the uploaded or selected Salesforce report)
- **Right:** Salesforce org instance name (automatically detected from the connected org)

Footer Configuration

The following footer elements are applied automatically:

- **Left:** User's company name combined with the required "*Confidential Information*" label
- **Center:** Page number and total page count (generated dynamically when the XLSX is created)
- **Right:** Export date and time (timestamp applied at the moment the report is formatted)

The screenshot displays the CRMREPOS API interface with a blue and white geometric background. It features two main numbered sections: '1' and '2'. Section 1, titled 'App - CRMRepos API Page', lists five steps: 1. Search for Report Name, 2. Get the Selected Report, 3. Encrypt Steps, 4. Save the Report, and 5. Proceed. Section 2, titled 'Process Uploaded Report', lists three steps: 1. Process the Run Report, 2. Download the Processed File, and 3. Email sent with Encrypted Report. A yellow box titled 'Encrypt Any Run Report' contains the text: 'Run Function Require CRMRepos Subscription Which Requires: > Master Login > Security Permission > External Client Setup Trusted IP: 20.119.16.11'. Logos for iSOLVIT and Salesforce are visible at the bottom left, and a page number '10/11' is at the bottom right.

1
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. Encrypt Steps
 - Check [Encrypt Report](#)
 - Enter [Encryption Code](#)
4. Save the Report
 - If you are adding a new report or updating an existing one, [Click to Save Report](#) to store the uploaded file.
5. Proceed
 - Click the [Next](#) button to continue.

2

Encrypt Any Run Report

Run Function Require CRMRepos Subscription
Which Requires:
➢ Master Login
➢ Security Permission
➢ External Client Setup
Trusted IP: 20.119.16.11

Process Uploaded Report

1. Process the Run Report
 - Click on [Process Uploaded Report](#) to begin processing the uploaded data.
2. Download the Processed File
 - [Click To Download Run File;](#) Non-Encrypted report.
3. Email sent with [Encrypted Report](#)

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Image 10

Run Report Capability with Encryption

Instead of navigating to Salesforce to open a report, manually running it, exporting the file, and then uploading it into the application and Select **Encrypt** and entering the **Encryption Code**. CRMReposAPI provides 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.

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

When **Encryption** is enabled, CRMReposAPI automatically applies Excel encryption to the generated XLSX file during report processing. The encrypted report is securely delivered according to the configured workflow, ensuring that sensitive data remains protected while preserving all formatting, headers, footers, and print settings.

This approach combines centralized security control, automated execution, and secure delivery—without adding complexity for end users.

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.

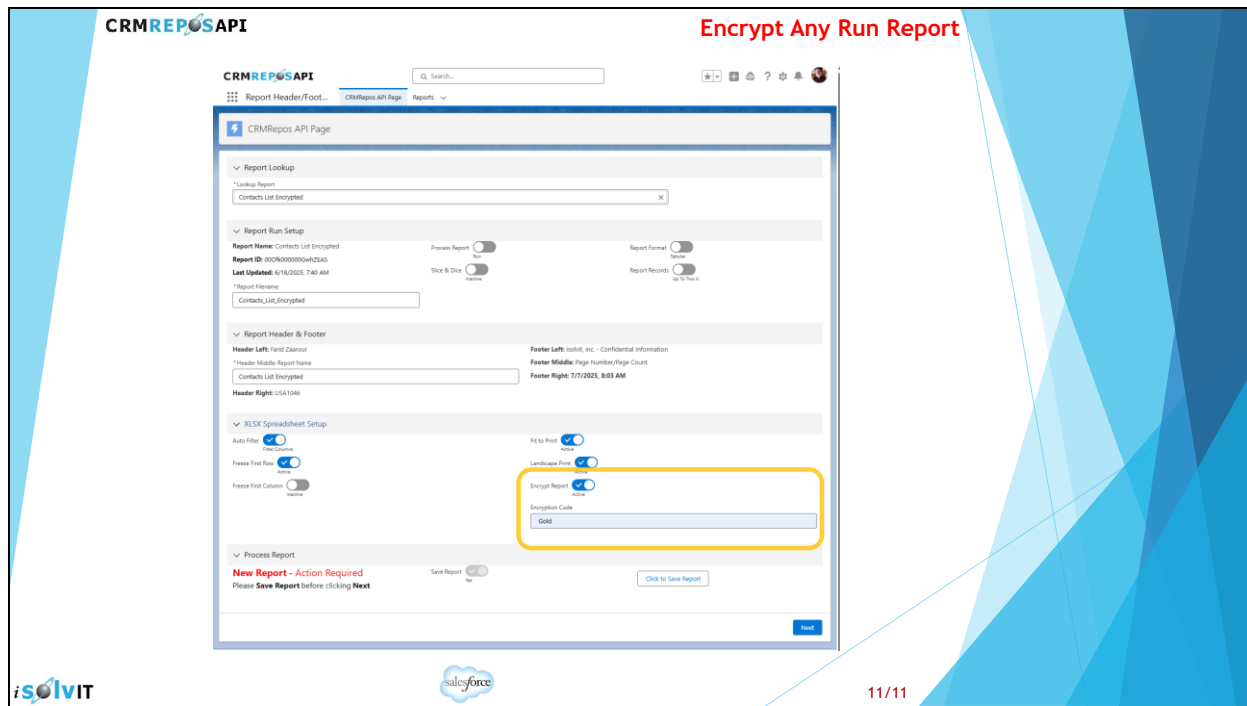


Image 11

Encrypted Run vs. Upload Processing

The **Encrypted Formatted** and **Encrypted Tabular Run** screens function identically to the **Upload** screen in terms of layout, configuration options, and processing behavior.

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

- **Upload:** The report file is manually exported from Salesforce and uploaded into CRMReposAPI.
- **Run:** CRMReposAPI executes the Salesforce report directly and processes it automatically.

All other steps—including encryption configuration, header and footer application, spreadsheet formatting, print optimization, and report delivery—remain the same.