



Image 1

Introduction

CRMReposAPI enables full customization of Salesforce report exports by automatically applying standardized, professional headers and footers to every report.

For reports containing sensitive data, CRMReposAPI provides optional passcode-based Excel encryption, ensuring secure distribution and alignment with organizational security policies and regulatory compliance requirements.

With **Slice & Dice**, a single Salesforce report can be executed once and automatically segmented by recipient email. Each recipient receives a personalized XLSX file containing only their relevant records, complete with customized headers and footers, delivered directly to their inbox.

CRMReposAPI is available **free of charge** on the Salesforce AppExchange and can be installed directly into your Salesforce organization.

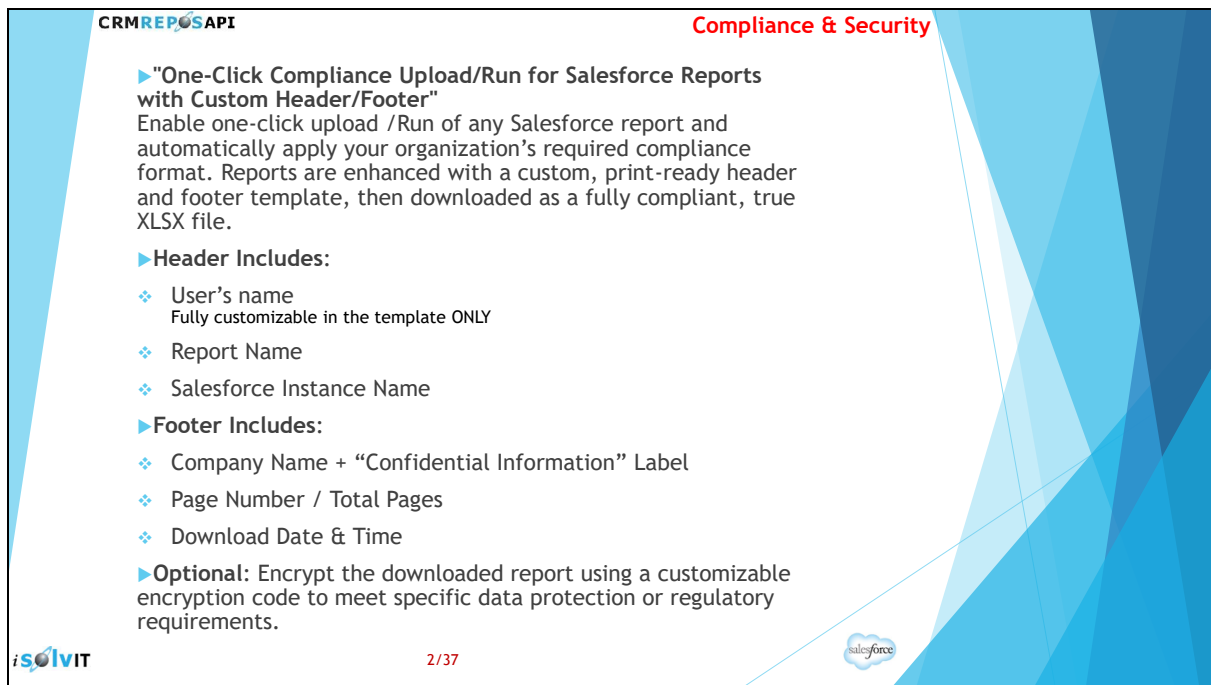


Image 2

Tabular and Formatted Report Processing in CRMReposAPI

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.

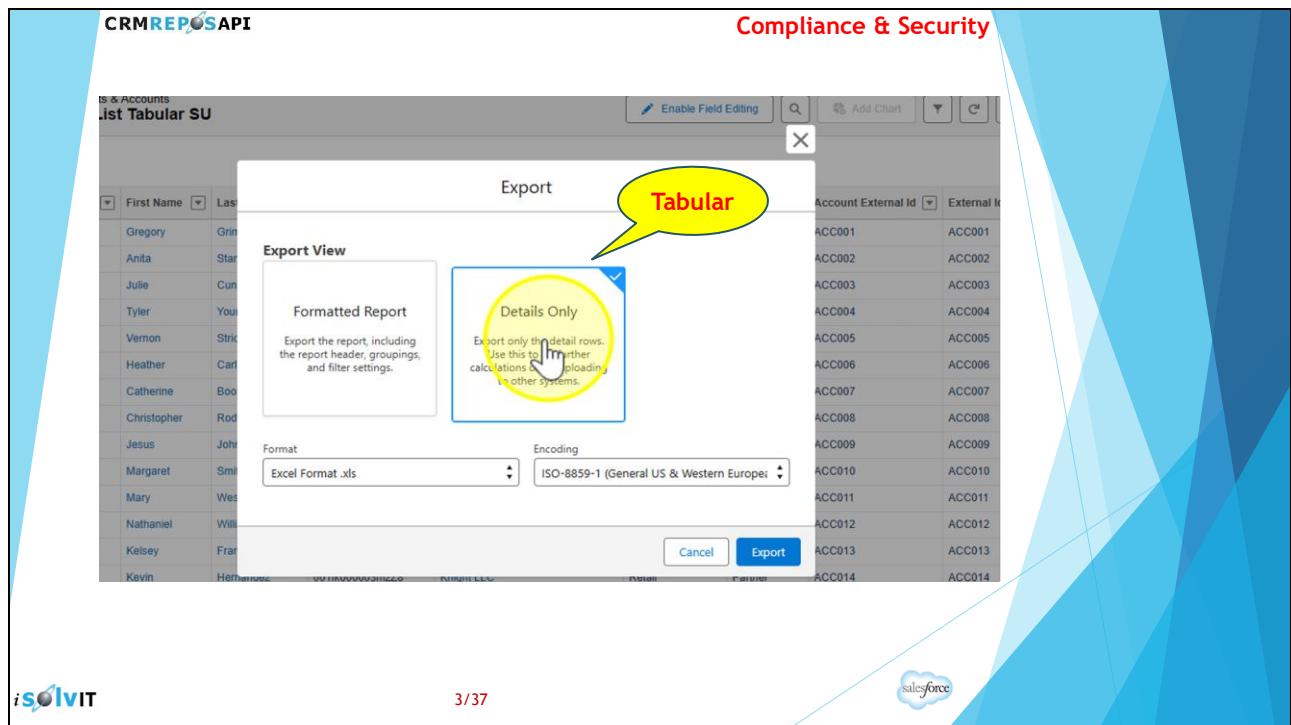


Image 3

Exporting a Tabular (Details) Report from Salesforce

When exporting a report from Salesforce, select **Tabular** as the report type, then click **Export**.

Choosing **Tabular** ensures that Salesforce exports the report as a flat, row-based dataset that preserves the original column order and raw data values without grouping, subtotals, or visual formatting.

This format is required for CRMReposAPI to correctly interpret Tabular report data and apply standardized headers, footers, and Excel-specific layout optimizations during processing.

Once exported, the **Tabular XLSX** file can be uploaded into CRMReposAPI or processed automatically using the **Run Report** capability

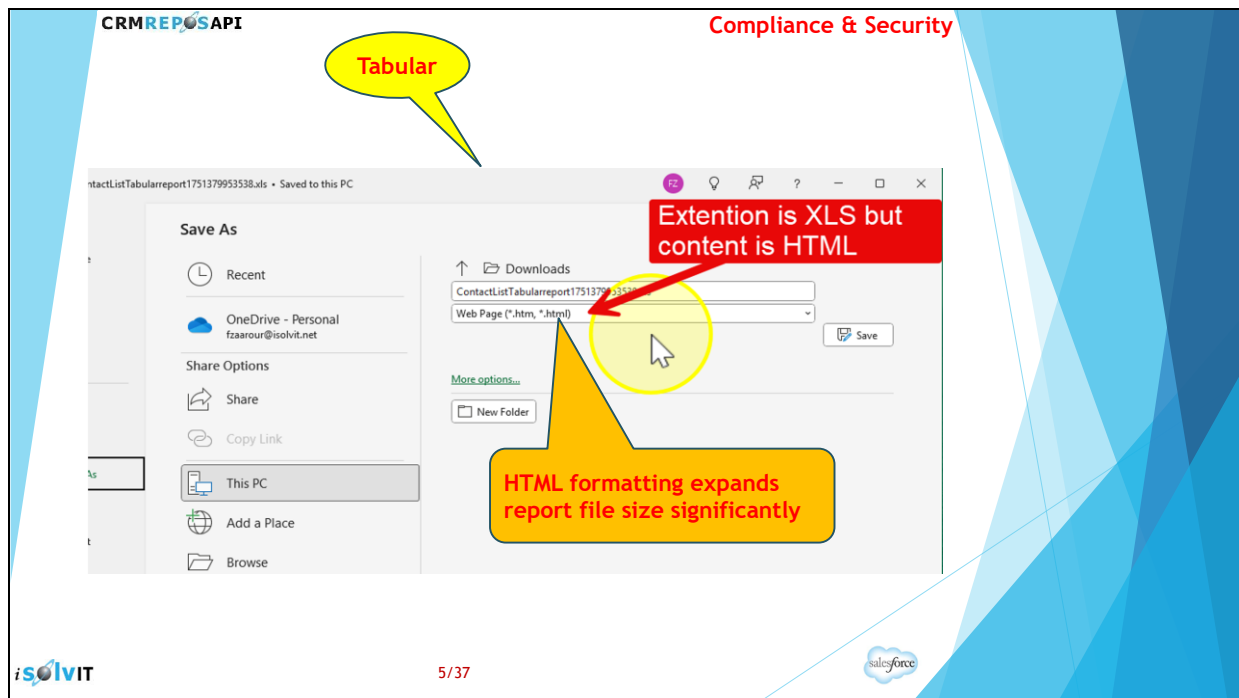


Image 4

Tabular Report Export Format and Excel Warning

The exported report type is **Tabular**.

When opening the exported file, Microsoft Excel may display a warning message. This occurs because Tabular reports exported with HTML formatting are saved using the “**.XLS**” file extension.

Although the file opens and behaves like an Excel spreadsheet, the underlying content is HTML, not a native Excel binary format. This is a known behavior of Salesforce “**Export as XLS**” output and does not affect the report data itself—only how Excel interprets the file format.

Additionally, file size may increase significantly due to the inclusion of HTML markup within the exported file.

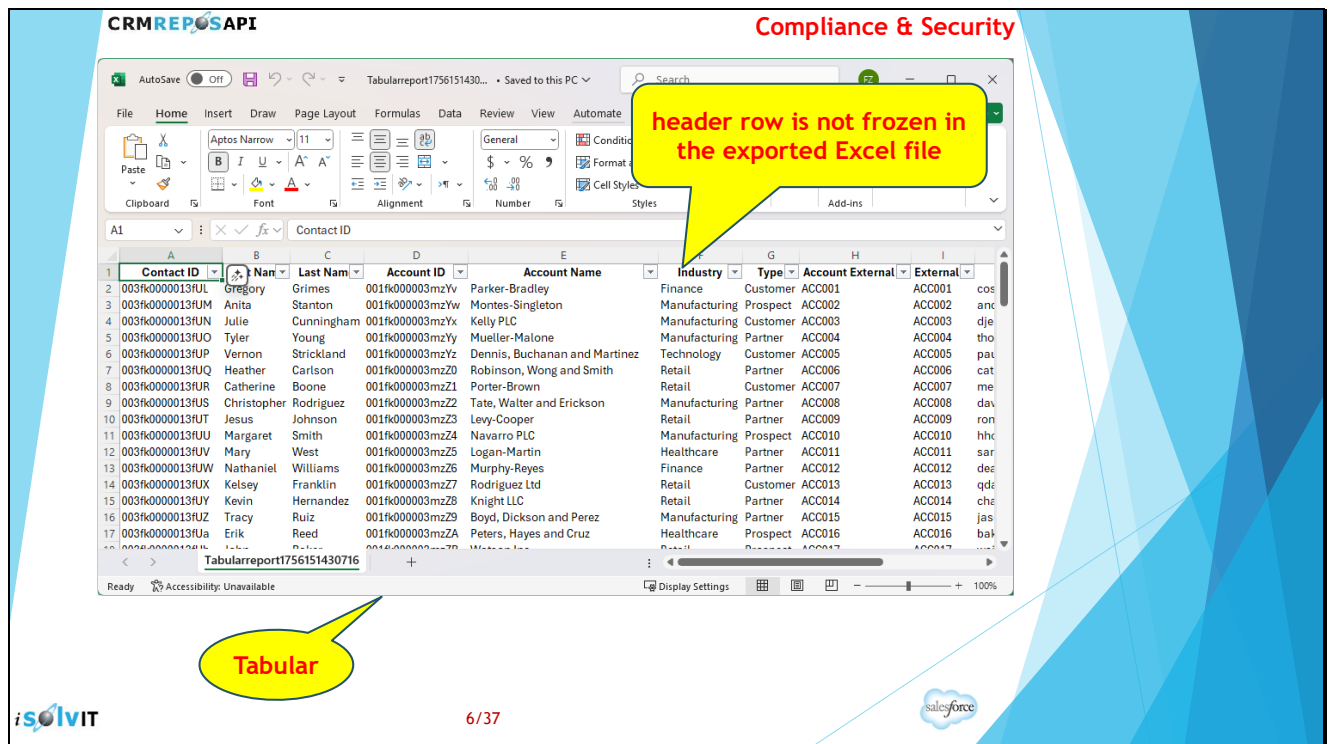


Image 5

Behavior When Opening the Exported File

The exported file opens and appears to be a standard spreadsheet, including a header row with filters applied.

However, because this XLS export is generated using **HTML format** rather than a native Excel workbook structure, the header row **is not frozen** and will scroll with the data.

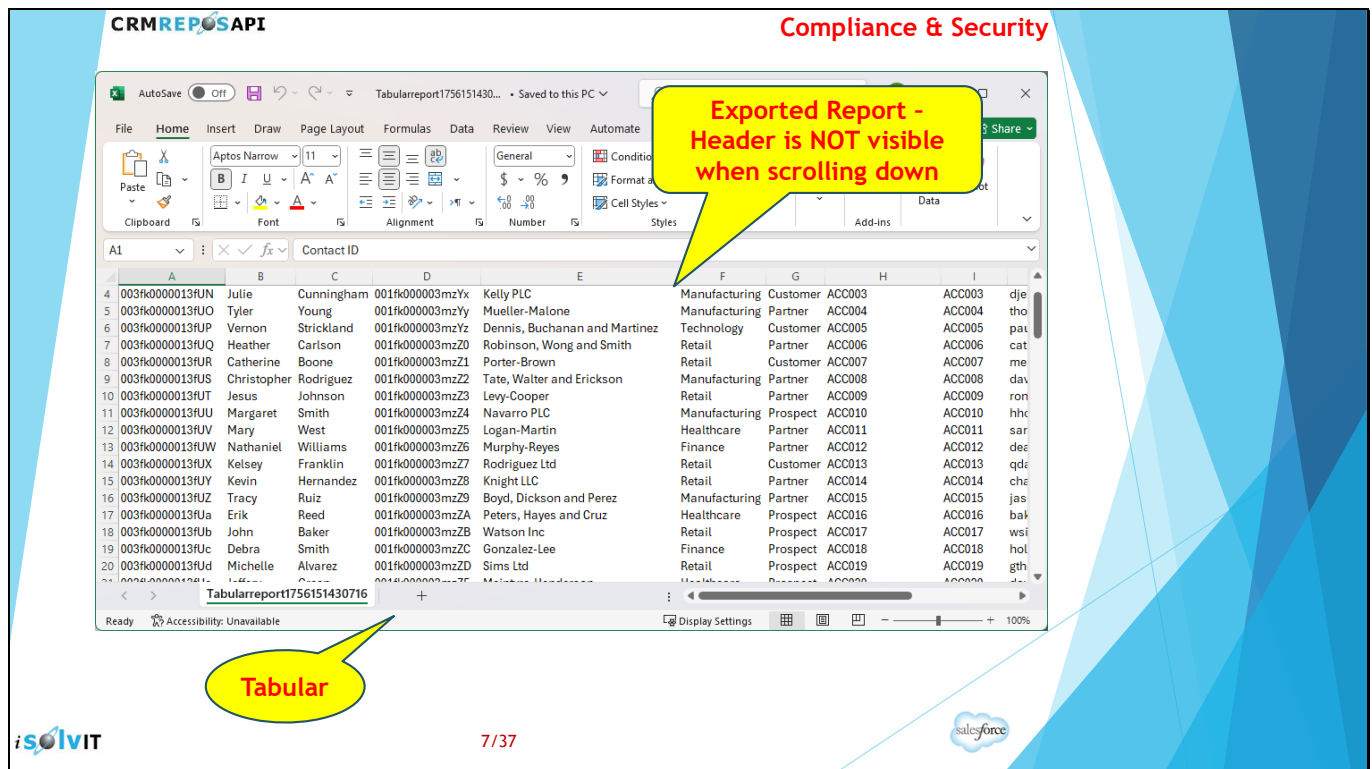


Image 6

As a Result:

- When scrolling vertically, the header row scrolls out of view.
- Reading, comparing, and analyzing large datasets become more difficult, particularly for reports with many columns.
- Header freezing is not supported in Salesforce's native **HTML-based XLS export** format.

CRMREPOSAPI

Compliance & Security

Tabular

Portrait

No Fit to Print

No Header

No Footer

Contact ID	First Name	Last Name	Account ID	Account Name
0035000001341L	Gregory	Grimes	0015000003m0W	Parker Bradley
0035000001341M	Avia	Stanton	0015000003m0W	Monica Singleton
0035000001341N	Julie	Cunningham	0015000003m0W	Kelly P.C.
0035000001341O	Tyler	Young	0015000003m0W	Michael Malone
0035000001341P	Vernon	Strickland	0015000003m0W	Dennis, Buchanan and Martin
0035000001341Q	Heather	Carlson	0015000003m0W	Robinson, Wengard and Smith
0035000001341R	Catherine	Bailey	0015000003m0W	Patrice Brown
0035000001341S	Christopher	Rodriguez	0015000003m0W	Tate, Walter and Ellison
0035000001341T	Jesus	Johnson	0015000003m0W	Levy Cooper
0035000001341U	Margaret	Smith	0015000003m0W	Newco P.C.
0035000001341V	Nary	Walt	0015000003m0W	Logan Martin
0035000001341W	Nathaniel	Williams	0015000003m0W	Murphy Reyes
0035000001341X	Kelsey	Franklin	0015000003m0W	Rodriguez Ltd
0035000001341Y	Ravin	Hernandez	0015000003m0W	Knight LLC
0035000001341Z	Tracy	Rui	0015000003m0W	Boyd, Dickson and Penz
0035000001341a	Erik	Reed	0015000003m0W	Peters, Hayes and Cruz
0035000001341b	John	Baker	0015000003m0W	Watson Inc
0035000001341c	Debra	Smith	0015000003m0W	Gonzalez Lee
0035000001341d	Alvamar	0015000003m0W	Sims Ltd	
0035000001341e	Jeffrey	Gross	0015000003m0W	McIntyre Henderson
0035000001341f	Ravin	Reavis	0015000003m0W	Johnson, Scott and Morgan
0035000001341g	El	Perkins	0015000003m0W	Frank, Connor and Andrews
0035000001341h	Christina	Ellison	0015000003m0W	Patrick Group
0035000001341i	Paul	Hernandez	0015000003m0W	Cooper Group
0035000001341j	Natalie	Olson	0015000003m0W	Smith, Reynolds and Carlson
0035000001341k	Heather	Avila	0015000003m0W	Ellis, Odom and Holloway
0035000001341l	Philip	Garcia	0015000003m0W	Franklin Ltd
0035000001341m	Kelly	Schultz	0015000003m0W	Francis Garcia
0035000001341n	Ravin	Smith	0015000003m0W	Powell, Chen and Wagner
0035000001341o	Tammy	Diaz	0015000003m0W	Martinez, Davis and Anderson
0035000001341p	Brianna	Gutierrez	0015000003m0W	Jackson Inc
0035000001341q	Anthony	Valencia	0015000003m0W	James Group
0035000001341r	John	Cobb	0015000003m0W	Higgins Shelton
0035000001341s	Harry	Smith	0015000003m0W	Hall, Jones and Williams
0035000001341t	Matthew	Garcia	0015000003m0W	Richardson Hall
0035000001341u	Ricardo	Wright	0015000003m0W	Cooper Group
0035000001341v	Walter	Mendoza	0015000003m0W	Spain and Sons
0035000001341w	Matthew	White	0015000003m0W	Crawford, Jennings and McDaniel
0035000001341x	Stephen	Taylor	0015000003m0W	Holbrook, Turner and Emerson
0035000001341y	Robert	Chen	0015000003m0W	Nguyen, Huntley and Jackson
0035000001341z	James	Lagan	0015000003m0W	Lee Schultz

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Image 7

Tabular Report Before Formatting

The **Print Preview** allows you to see exactly how the report will appear when printed, including alignment, page breaks, header and footer placement, and overall page layout.

By contrast, the **native exported report** contains no headers or footers and is not optimized for printing. In portrait orientation, the content is often split across multiple pages, resulting in poor readability and inconsistent formatting.

CRMREPOSAPI **Compliance & Security**

Tabular

Landscape

No Header

No Footer

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type
0039000001291A	Gregory	Glines	00390000039v1v	Parker Bradley	Finance	Customer
0039000001291B	Andy	Stanton	00390000039v1w	Marion Singleton	Manufacturing	Prospect
0039000001291C	Julia	Corningham	00390000039v1x	Kelly PLC	Manufacturing	Customer
0039000001291D	Tyler	Young	00390000039v1y	Marler Malone	Manufacturing	Partner
0039000001291E	Wesley	Stockland	00390000039v1z	Stevens, Buchanan and Martinez	Technology	Customer
0039000001291F	Heather	Carlson	00390000039v20	Rabinson, Wang and Smith	Retail	Partner
0039000001291G	Caroline	Brown	00390000039v21	Farley Brown	Retail	Customer
0039000001291H	Christopher	Rodriguez	00390000039v22	Tate, Weber and Erickson	Manufacturing	Partner
0039000001291I	Isaac	Johnson	00390000039v23	Imry Cooper	Retail	Partner
0039000001291J	Huggert	Smith	00390000039v24	Wasson PLC	Manufacturing	Prospect
0039000001291K	Mary	West	00390000039v25	Lagan Martin	Healthcare	Partner
0039000001291L	William	Williams	00390000039v26	Ruggly Rogers	Finance	Partner
0039000001291M	Reiner	Freiden	00390000039v27	Reidgan Ltd	Retail	Customer
0039000001291N	Kevin	Hernandez	00390000039v28	Knigh LLC	Retail	Partner
0039000001291O	Tony	Rud	00390000039v29	Rapp, O'Brien and Perez	Manufacturing	Partner
0039000001291P	Reed	Reed	00390000039v2A	Peters, Hayes and Cruz	Healthcare	Prospect
0039000001291Q	Jane	Baker	00390000039v2B	Wasson Inc	Retail	Prospect
0039000001291R	Dana	Smith	00390000039v2C	Ramsey Lane	Finance	Prospect
0039000001291S	Michelle	Alaraz	00390000039v2D	Simi Ltd	Retail	Prospect
0039000001291T	Jeffrey	Green	00390000039v2E	Holings-Henderson	Healthcare	Prospect
0039000001291U	Kevin	Evans	00390000039v2F	Johnson, Scott and Morgan	Finance	Customer
0039000001291V	Patricia	Parsons	00390000039v2G	Parks, Gomez and Andrews	Technology	Customer
0039000001291W	Christina	Ellson	00390000039v2H	Parish Group	Healthcare	Customer
0039000001291X	Paul	Hernandez	00390000039v2I	Casper Group	Finance	Customer
0039000001291Y	Natalie	Dillon	00390000039v2J	Smith, Reynolds and Carlson	Technology	Partner
0039000001291Z	Heather	Avila	00390000039v2K	Eds, Cohen and Ridgeway	Manufacturing	Customer
0039000001291A	Philip	Garcia	00390000039v2L	Franklin Ltd	Finance	Partner
0039000001291B	Kelly	Schultz	00390000039v2M	French-Sullivan	Manufacturing	Partner
0039000001291C	Kevin	Smith	00390000039v2N	Powell, Chen and Wagner	Healthcare	Customer

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Image 8

The **Print Preview** provides an accurate representation of how the report will appear when printed, including column alignment, page breaks, header and footer placement, orientation, and overall layout.

In contrast, the **native exported report** is not print-optimized. It includes no headers or footers, and both **portrait and landscape orientations** are frequently split across multiple pages, even when the data could reasonably fit on a single page. This results in fragmented output, reduced readability, and additional manual cleanup before printing or distribution.

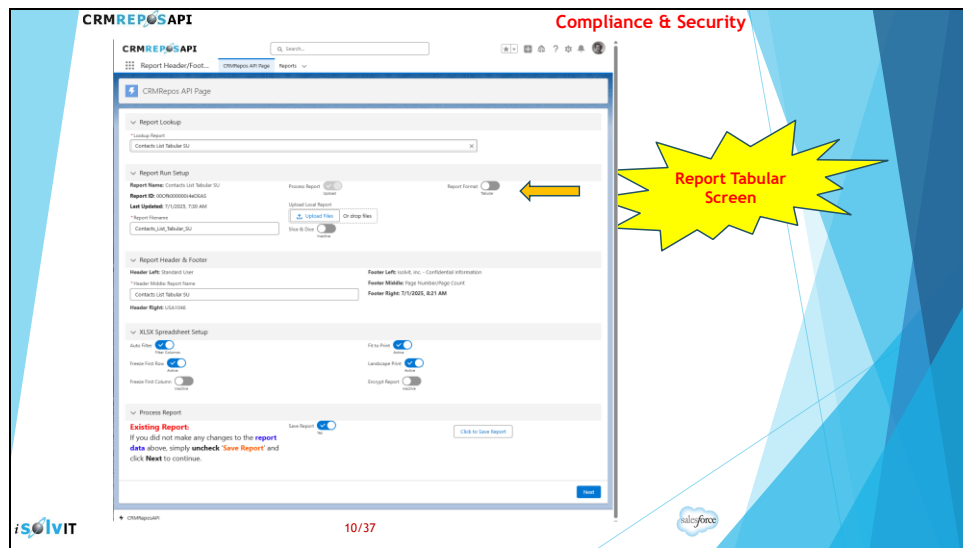


Image 9

Report Configuration Overview

After selecting a report and clicking **Get Selected Report**, the Flow displays the complete configuration for the selected Salesforce report. This includes header and footer templates, formatting options, report type, encryption settings, and all previously saved customizations. All settings are automatically retrieved so the user can review or update them as needed.

Header and Footer Element Definitions

The following header and footer elements are system-defined and populated from trusted Salesforce and org metadata to ensure consistency and compliance.

Header

- **Left Header:** Displays the user's full name
- **Center Header:** Automatically displays the Salesforce report name
- **Right Header:** Displays the Salesforce org instance

Footer

- **Left Footer:** Displays the user's company name followed by the "*Confidential Information*" label
- **Middle Footer:** Displays the current page number and total page count
- **Right Footer:** Displays the export report date and time

These elements are system-controlled and cannot be modified dynamically per run.

Spreadsheet Formatting Options

CRMReposAPI automatically applies the following spreadsheet formatting options:

- AutoFilter enabled
- Freeze first row and/or first column
- Print-optimized layout
- Landscape or Portrait page orientation for optimal page utilization

Report Processing Settings

The report processing configuration for this screen is as follows:

- **Process Report:** Upload
- **Report Format:** Tabular
- **Upload Method:** Drag and drop or select a file from the user's device
- **Slice & Dice:** Not active for this upload

Summary

Altogether, this screen provides a complete, easy-to-understand overview of how CRMReposAPI structures, formats, and prepares a Tabular report before generating the final Excel file.

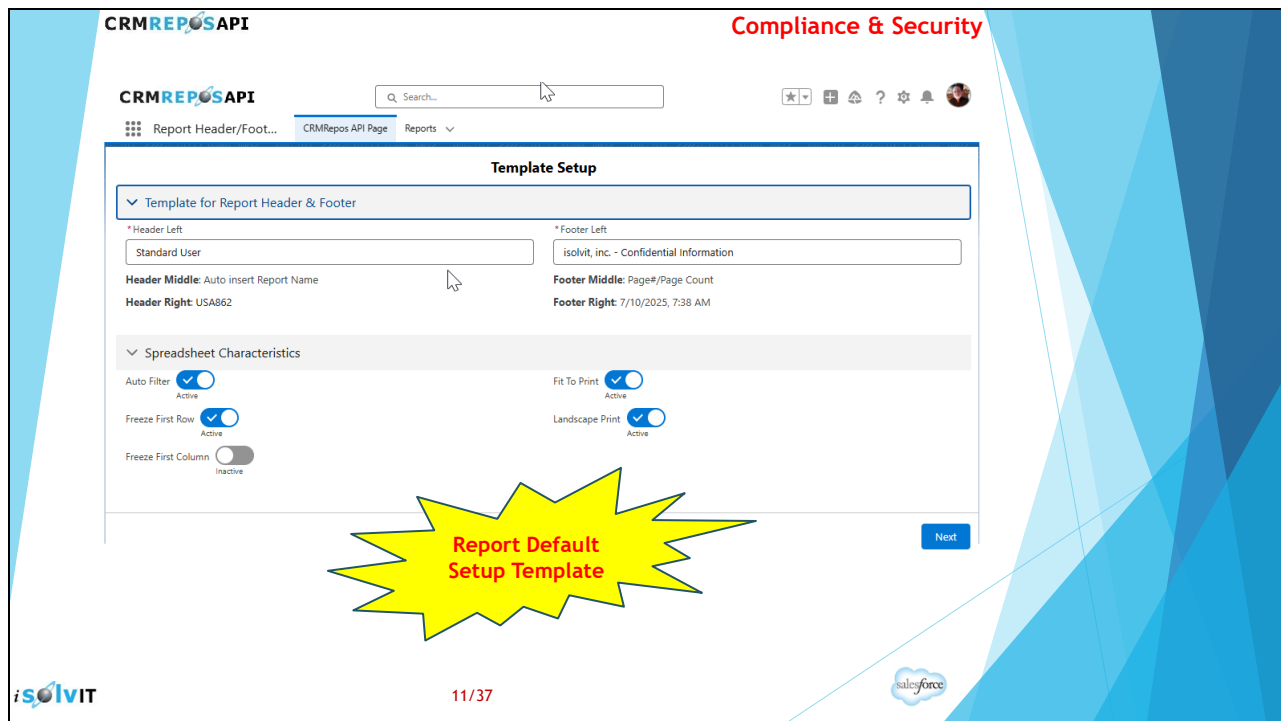


Image 10

Report Template Setup Screen

The **Report Template Setup** screen defines the default header, footer, and spreadsheet formatting that CRMReposAPI automatically applies to every new report you process. Once configured, these settings become your organization's **standard reporting template**, ensuring consistency, compliance, and a uniform presentation across all exported spreadsheets.

Header Defaults

Each new report automatically includes the following values:

- **Header Left:** User name (*editable*)
- **Header Center:** Report name (*automatically inserted and displayed*)
- **Header Right:** Salesforce instance name (*automatically displayed*)

Footer Defaults

The footer is preconfigured with compliance and tracking information:

- **Footer Left:** Company name combined with “*Confidential Information*” (*editable*)
- **Footer Center:** Page number with total page count (Page X of Y)
- **Footer Right:** Export date

Spreadsheet Formatting Options

CRMReposAPI applies automatic formatting enhancements to improve usability and print quality:

- Enables **Auto-Filter** on the header row
- Freezes the **first row and/or first column** for easier navigation
- **Fit to Print** optimization for clean, professional output
- Apply **Portrait or Landscape** page orientation for improved printed layout

Slice & Dice (If Enabled for Your Organization)

If your organization has been granted access to **Slice & Dice** (trial or licensed), an additional configuration section becomes available.

This section introduces two editable fields:

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

Both fields are prepopulated with a dynamic message that includes:

- Report name
- Number of records per recipient
- Report run date (UTC)

CRMReposAPI

Compliance & Security

AutoSave OFF

Contacts_List_Tabular_SU_20250825152745.xlsx • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles Add-ins

Processed Report - Freeze 1st Row

Tabular Report Processed

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id	External Id
003k0000013fUJ	Gregory	Grimes	001f000003mzYv	Parker-Bradley	Finance	Customer	ACC001	ACC001
003k0000013fUM	Anita	Stanton	001f000003mzYw	Montes-Singleton	Manufacturing	Prospect	ACC002	ACC002
003k0000013fUN	Julie	Cunningham	001f000003mzYx	Kelly PLC	Manufacturing	Customer	ACC003	ACC003
003k0000013fUO	Tyler	Young	001f000003mzYy	Mueller-Malone	Manufacturing	Partner	ACC004	ACC004
003k0000013fUP	Vernon	Strickland	001f000003mzYz	Dennis, Buchanan and Martinez	Technology	Customer	ACC005	ACC005
003k0000013fUQ	Heather	Carlson	001f000003mzZ0	Robinson, Wong and Smith	Retail	Partner	ACC006	ACC006
003k0000013fUR	Catherine	Boone	001f000003mzZ1	Porter-Brown	Retail	Customer	ACC007	ACC007
003k0000013fUS	Christopher	Rodriguez	001f000003mzZ2	Tate, Walter and Erickson	Manufacturing	Partner	ACC008	ACC008
003k0000013fUT	Jesus	Johnson	001f000003mzZ3	Levy-Cooper	Retail	Partner	ACC009	ACC009
003k0000013fUW	Margaret	Smith	001f000003mzZ4	Navarro PLC	Manufacturing	Prospect	ACC010	ACC010
003k0000013fUV	Mary	West	001f000003mzZ5	Logan-Martin	Healthcare	Partner	ACC011	ACC011
003k0000013fUW	Nathaniel	Williams	001f000003mzZ6	Murphy-Reyes	Finance	Partner	ACC012	ACC012
003k0000013fUX	Kelsey	Franklin	001f000003mzZ7	Rodriguez Ltd	Retail	Customer	ACC013	ACC013
003k0000013fUY	Kevin	Hernandez	001f000003mzZ8	Knight LLC	Retail	Partner	ACC014	ACC014
003k0000013fUZ	Tracy	Ruiz	001f000003mzZ9	Boyd, Dickson and Perez	Manufacturing	Partner	ACC015	ACC015
003k0000013fUa	Enk	Reed	001f000003mzZA	Peters, Hayes and Cruz	Healthcare	Prospect	ACC016	ACC016
003k0000013fUb	John	Baker	001f000003mzZB	Watson Inc	Retail	Prospect	ACC017	ACC017
003k0000013fUc	Debra	Smith	001f000003mzZC	Gonzalez-Lee	Finance	Prospect	ACC018	ACC018
003k0000013fUd	Mirabella	Alvaraz	001f000003mzZD	Sims Ltd	Retail	Partner	ACC019	ACC019

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Image 11

Tabular Report

This example shows a **Tabular report** after being processed through **CRMReposAPI**. The generated spreadsheet includes standardized formatting applied automatically, with the **first header row frozen** to maintain column visibility while scrolling. The report is saved using the **newly defined report file name**, ensuring consistency with your naming conventions and simplifying identification, distribution, and archiving.

CRMREPOSAPI Compliance & Security

AutoSave OFF Contacts_List_Tabular_SU_20250825152745.xlsx • Saved to the cloud

File Home Insert Draw Page Layout Formulas Data Review View Automate

Clipboard Font Alignment Number Styles

Processed Report - Freeze 1st Row

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id	Ext
003k0000013Rlf	Kevin	Evans	001f000003mzZF	Johnson, Scott and Morgan	Finance	Customer	ACC021	ACCC
003k0000013Rlg	Jill	Parsons	001f000003mzZG	Frank, Gomez and Andrews	Technology	Customer	ACC022	ACCC
003k0000013Rlh	Christina	Ellison	001f000003mzZH	Patrick Group	Healthcare	Customer	ACC023	ACCC
003k0000013Rli	Paul	Hernandez	001f000003mzZI	Cooper Group	Finance	Customer	ACC024	ACCC
003k0000013Rlj	Natalie	Dillon	001f000003mzZJ	Smith, Reynolds and Carlson	Technology	Partner	ACC025	ACCC
003k0000013Rlk	Heather	Arellano	001f000003mzZK	Ellis, Odom and Holloway	Manufacturing	Customer	ACC026	ACCC
003k0000013Rll	Philip	Garcia	001f000003mzZL	Franklin Ltd	Finance	Partner	ACC027	ACCC
003k0000013Rlm	Kelly	Schultz	001f000003mzZM	French-Garcia	Manufacturing	Partner	ACC028	ACCC
003k0000013Rln	Kevin	Smith	001f000003mzZN	Powell, Chen and Wagner	Healthcare	Customer	ACC029	ACCC
003k0000013Rlo	Tammy	Diaz	001f000003mzZO	Martinez, Davis and Anderson	Manufacturing	Partner	ACC030	ACCC
003k0000013Rlp	Brianna	Gutierrez	001f000003mzZP	Jackson Inc	Finance	Partner	ACC031	ACCC
003k0000013Rlq	Anthony	Valencia	001f000003mzZQ	James Group	Technology	Prospect	ACC032	ACCC
003k0000013Rlr	John	Cole	001f000003mzZR	Higgins-Shelton	Finance	Customer	ACC033	ACCC
003k0000013Rls	Haley	Smith	001f000003mzZS	Hall, Jones and Williams	Finance	Partner	ACC034	ACCC
003k0000013Rlt	Matthew	Garcia	001f000003mzZT	Richardson-Hall	Finance	Customer	ACC035	ACCC
003k0000013Rlu	Ricardo	Wright	001f000003mzZU	Cooper Group	Finance	Partner	ACC036	ACCC
003k0000013Rlv	Walter	Mendoza	001f000003mzZV	Spencer and Sons	Healthcare	Partner	ACC037	ACCC
003k0000013Rlw	Matthew	White	001f000003mzZW	Crawford, Jennings and Mcdaniel	Manufacturing	Prospect	ACC038	ACCC
003k0000013Rlx	Stanley	Taylor	001f000003mzZY	Holland, Turner and Imanax	Finance	Prospect	ACC039	ACCC

Tabular

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Display Settings

100%

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Image 12

The header row is automatically frozen, ensuring that as you scroll down the spreadsheet, **Record 22** appears directly beneath the first header row. This always keeps column titles visible, making it easier to read, compare, and analyze large datasets.

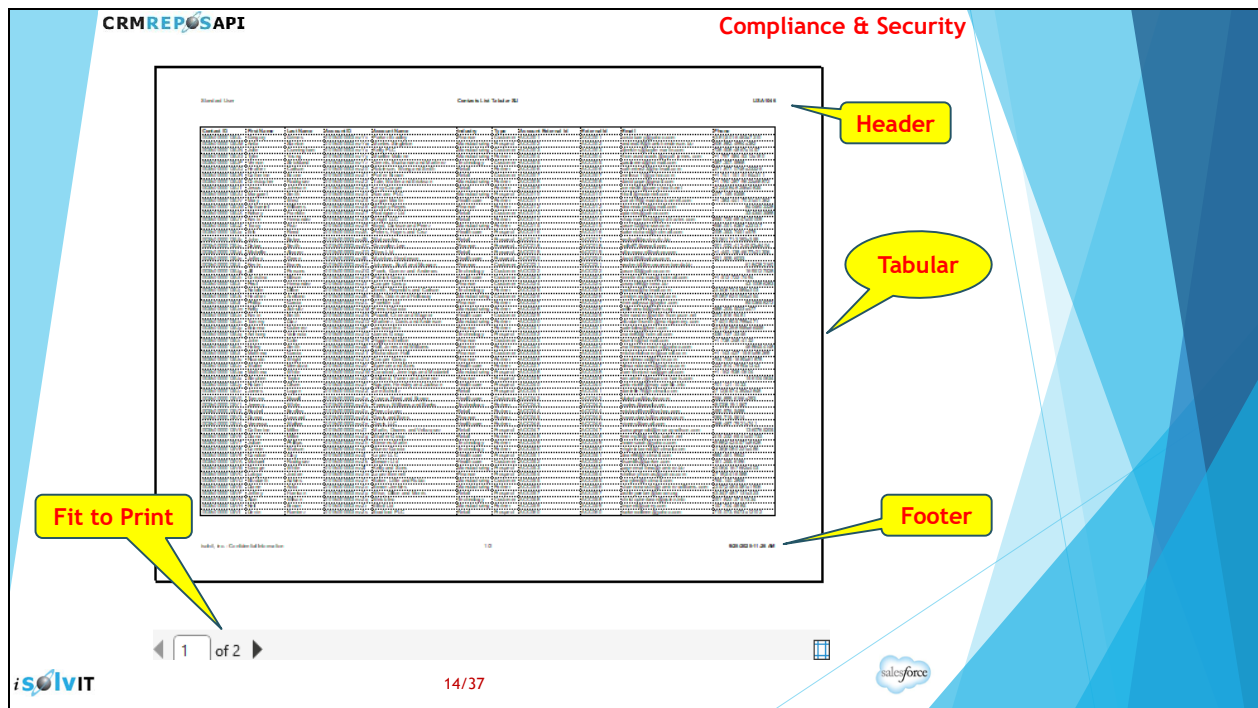


Image 13

Print Preview – New Processed Report:

The **Fit to Print** feature automatically optimizes the Excel page layout by adjusting scaling, margins, and page width so the entire report fits cleanly on the printed page. Standardized **headers and footers** are applied consistently across all pages, displaying key details such as the report name, user, organization, page numbers, and run date. This prevents columns from being cut off, minimizes unnecessary page breaks, and delivers a professional, fully compliant, print-ready layout every time.

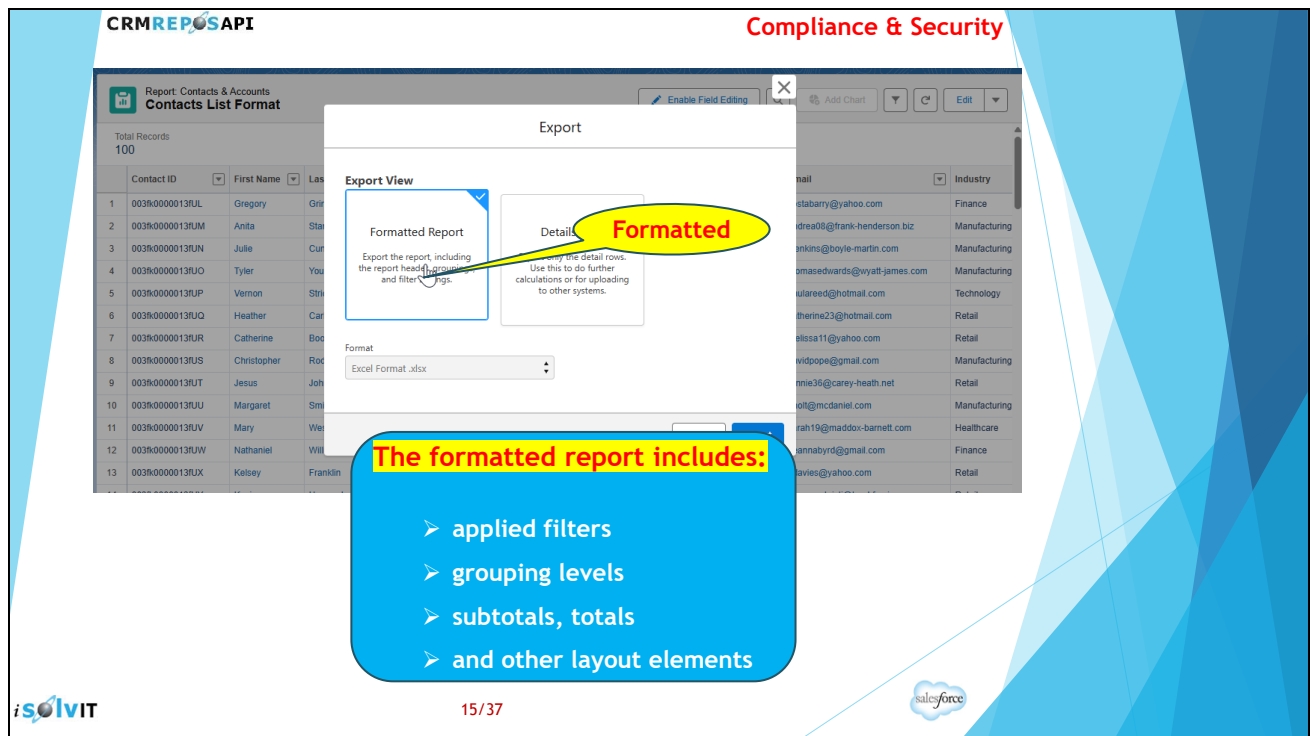


Image 14

Formatted Report Example

In this next example, we demonstrate a **Formatted Report**.

A formatted report preserves all Salesforce-defined configurations—including filters, grouping levels, subtotals, totals, and layout elements—and applies them directly to the Excel output. This ensures the exported spreadsheet accurately reflects the structure, hierarchy, and presentation of the original Salesforce report.

CRMREPOSAPI

Compliance & Security

Contacts List Format: 2025-07-02 05:05:15 • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard Font Paragraph Styles Number & Date Conditional Formatting Styles Cell Styles Data Tables Sort & Filter Filter & Sort Add-ins Analysis Toolpak Data

Contacts List Format

As of 2025-07-03 12:05:13 Pacific Standard Time/PST • Generated by Field Lessor

Filtered By
Show My contacts
Date Field Created Date equals Custom (8/11/2025 to null)

Contact ID	First Name	Last Name	Account ID	Account Name	Phone	Email	Industry	Type	
00190000013UJL	Gregory	Grimes	00190000013m7v	Parker Bradley	(381) 444-1100	cost	Finance	Customer	
00190000013UJM	Anita	Stanford	00190000013m7u	Montez Singleton	806	andh	biotech	Manufacturing	Prospect
00190000013UJN	Julie	Cummingham	00190000013m7t	Kelly PLC	728	djen	Manufacturing	Customer	
00190000013UJO	Tyler	Young	00190000013m7s	Mueller-Malone	+1-	80	thom	Manufacturing	Partner
00190000013UJP	Nelson	Strickland	00190000013m7r	Cheney, Buchanan and Martinez	587	psal	Technology	Customer	
00190000013UJQ	Hauheer	Carlson	00190000013m7q	Robinson, Wong and Smith	271	6	cath	Retail	Partner
00190000013UJR	Catherine	Boone	00190000013m7p	Porter Brown	+1-	11	med	Retail	Customer
00190000013UJS	Christopher	Rodriguez	00190000013m7o	Tate, Walter and Erickson	+1-	8872	dean	Manufacturing	Partner
00190000013UJT	Jesse	Johnson	00190000013m7n	Larry Cooper	(227)	5	nom	Retail	Partner
00190000013UJU	Margaret	Smith	00190000013m7m	Neumann PLC	477	hwal	Manufacturing	Prospect	
00190000013UJV	Mary	West	00190000013m7l	Logan Martin	+1-	1362	sara	Healthcare	Partner
00190000013UJW	Kathleen	Williams	00190000013m7k	Murphy Reyes	860	dean	Finance	Partner	
00190000013UJX	Kathryn	Franklin	00190000013m7j	Rodriguez Ltd	534	qfan	Retail	Customer	
00190000013UJY	Kevin	Hernandez	00190000013m7i	Knight LLC	955	19	chac	Retail	Partner
00190000013UJZ	Thane	Raid	00190000013m7h	Royal, Dickson and Perez	956	7	jane	Manufacturing	Partner
00190000013UJA	Erik	Reed	00190000013m7g	Peters, Hayes and Choi	008	jake	Healthcare	Prospect	
00190000013UJB	John	Baker	00190000013m7f	Watson Inc	1384	rich	Retail	Prospect	
00190000013UJC	Debra	Smith	00190000013m7e	Gonzalez-Lee	001	8404	huth	Finance	Prospect
00190000013UJD	Michelle	Alvarez	00190000013m7d	Sims Ltd	+1-	1306	gthc	Retail	Prospect
00190000013UJE	Jeffrey	Green	00190000013m7c	Mintrop-Henderson	323	dean	Healthcare	Prospect	
00190000013UJF	Kevin	Evans	00190000013m7b	Johnson, Scott and Moreman	638	astch	Finance	Customer	

Contacts List Format

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Formatted

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Image 15

Formatted Report Details on the First Page

On the first page of a **Formatted Report**, CRMReposAPI automatically displays key report metadata, including the report name, export date, and the user who generated the report. In addition, all applied Salesforce report filters are clearly listed.

This information provides a complete and accurate snapshot of the report's context and configuration, ensuring transparency, traceability, and ease of validation for reviewers, auditors, and downstream recipients.

CRMREPOSAPI Compliance & Security

Contacts List Format
As of 2025-07-03 12:03:13 Pacific Standard Time • Generated by Farid Zaarour

Filtered By
Show: My contacts
Date Field: Created Date equals Custom (6/11/2025 to null)

Contact ID	First Name	Last Name	Account ID	Account Name
003fk0000013FUL	Gregory	Grimes	001fk000003mzVw	Parker-Bradley
003fk0000013FUM	Anita	Stanton	001fk000003mzVw	Montes-Singleton
003fk0000013FUN	Julie	Cunningham	001fk000003mzYx	Kelly PLC
003fk0000013FUO	Tyler	Young	001fk000003mzYy	Mueller-Malone
003fk0000013FUP	Vernon	Strickland	001fk000003mzYz	Dennis, Buchanan and Martinez
003fk0000013FUQ	Heather	Carlson	001fk000003mz20	Robinson, Wong and Smith
003fk0000013FUR	Catherine	Boone	001fk000003mz21	Porter-Brown
003fk0000013FUS	Christopher	Rodriguez	001fk000003mz22	Tate, Walter and Erickson
003fk0000013FUT	Jesus	Johnson	001fk000003mz23	Levy-Cooper
003fk0000013FUU	Margaret	Smith	001fk000003mz24	Navarro PLC
003fk0000013FUV	Mary	West	001fk000003mz25	Logan-Martin
003fk0000013FUW	Nathaniel	Williams	001fk000003mz26	Murphy-Reyes
003fk0000013FUX	Kelsey	Franklin	001fk000003mz27	Rodriguez Ltd
003fk0000013FUY	Kevin	Hernandez	001fk000003mz28	Knight LLC
003fk0000013FUZ	Tracy	Ruiz	001fk000003mz29	Boyd, Dickson and Perez
003fk0000013FUA	Erik	Reed	001fk000003mz2A	Peters, Hayes and Cruz
003fk0000013FUb	John	Baker	001fk000003mz2B	Watson Inc
003fk0000013FUc	Debra	Smith	001fk000003mz2C	Gonzalez-Lee
003fk0000013FUd	Michelle	Alvarez	001fk000003mz2D	Sims Ltd
003fk0000013FUe	Jeffery	Green	001fk000003mz2E	Mcintyre-Henderson

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Image 16

CRMReposAPI Enhancement for Formatted Reports

After export, CRMReposAPI enhances Salesforce **Formatted Reports** by applying standardized headers and footers, **Fit to Print** optimization, and consistent page layout rules that are not included in Salesforce's native formatted XLSX output.

These enhancements ensure that formatted reports are:

- Print-ready in both **portrait and landscape** orientations
- Consistently branded and compliant across all pages
- Easier to review, distribute, and archive without manual rework

By bridging the gap between Salesforce's native export and real-world reporting requirements, CRMReposAPI delivers professional, audit-ready formatted Excel reports with no additional effort.

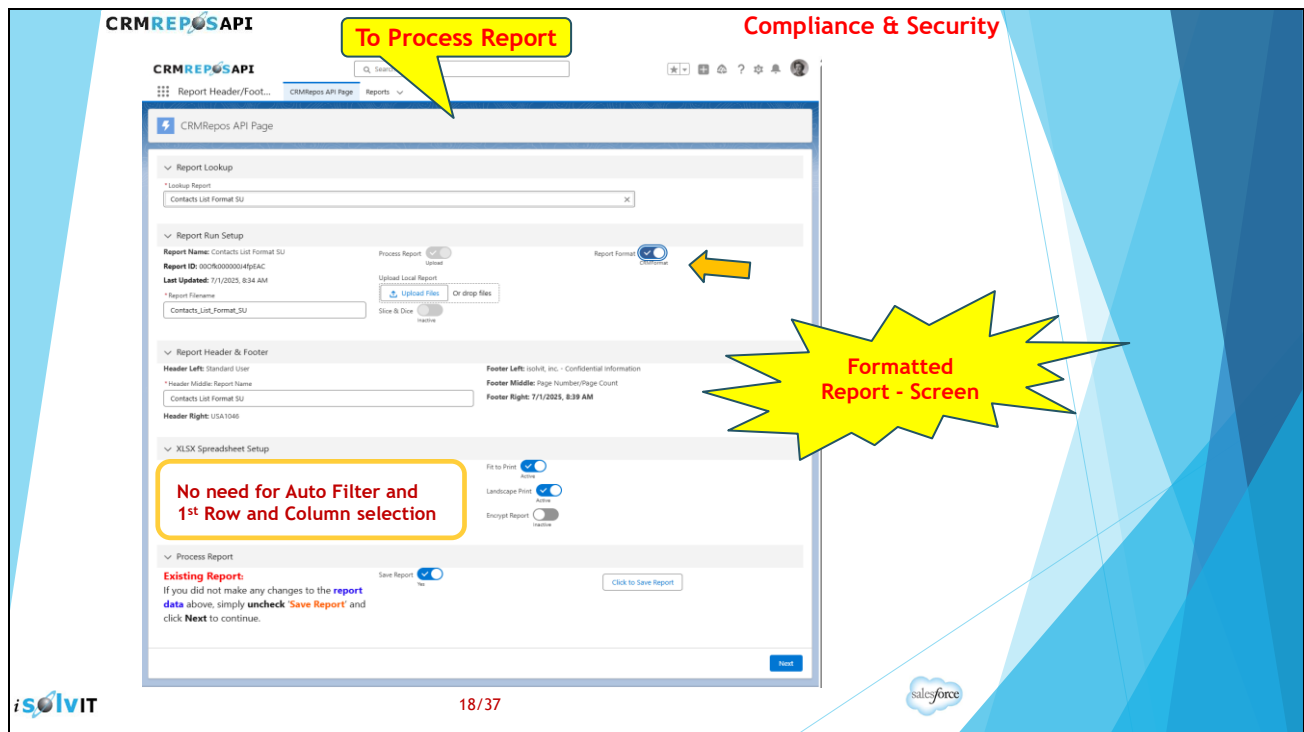


Image 17

Formatted Report Formatting Screen

This screen displays all available formatting options for **Formatted Reports** processed through CRMReposAPI.

Available Formatting Options

- **Fit to Print:** Optimizes the worksheet layout for clean, professional printing.
- **Page Orientation:** Select **Portrait** or **Landscape** layout.
- **Report Format:** Set to **Formatted** to preserve Salesforce report structure.

Editable Fields

Only the following fields can be modified on this screen:

- **Report Name**

- **New Report File Name**

New Report Setup

When processing a new formatted report, CRMReposAPI creates a copy of your default template. This copy can be customized as needed for the selected report.

To retain your changes, click **Save** to store the report setup.

Existing Report Setup

When working with an existing report, the previously saved configuration is loaded automatically. You may review and update the settings as required.

After making changes, click **Save** to update the stored setup.

Uploading a Report

In this example, the report file has been uploaded directly from a local device. You can **drag and drop** the exported Salesforce formatted report into this screen to begin processing.

Next Step

Once the report file is uploaded, click **Next** to continue with formatting and report processing.

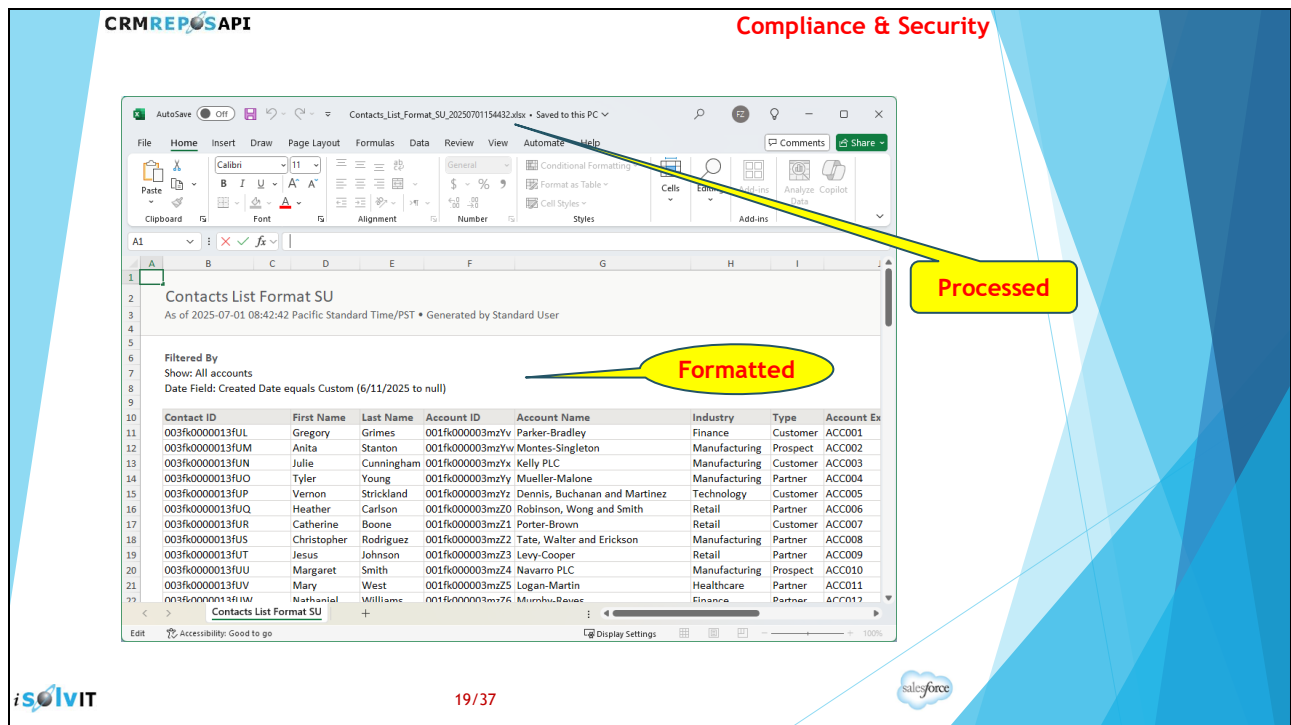


Image 18

Processed Report File Naming

The processed report is saved using the **new file name** defined in the Report Setup, ensuring alignment with your organization's naming standards.

To further support traceability, the **export date is automatically appended** to the filename. This makes it easy to identify when each report was generated, prevents accidental overwrites, and simplifies version tracking, auditing, distribution, and long-term archiving.



The processed report includes both a header and a footer, making it presentation-ready and compliant.

The **Fit to Print** feature automatically optimizes the Excel page layout by adjusting scaling, margins, and page width to ensure the entire report fits neatly on the printed page. This prevents columns from being cut off, reduces unnecessary page breaks, and consistently produces a clean, print-ready layout.

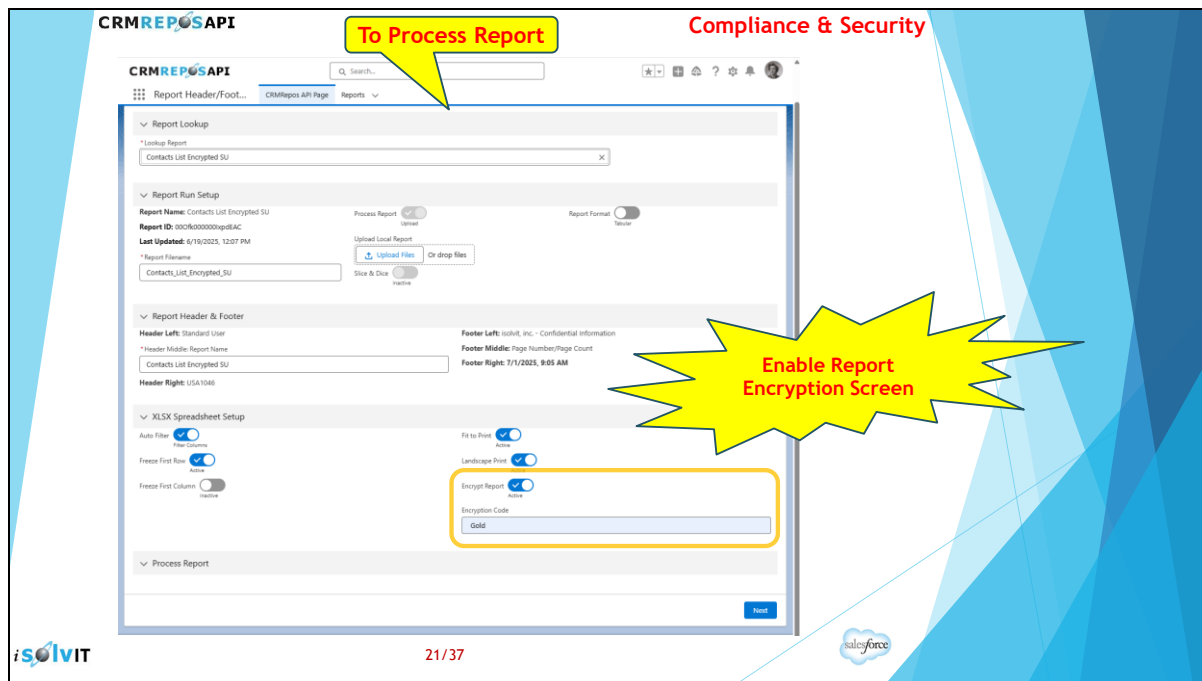


Image 20

This screen allows any uploaded **Salesforce report**, whether **Tabular** or **Formatted**, to be encrypted for additional protection.

To begin, simply **drag and drop** the exported Salesforce report file into the window.

If enhanced security is required, enable **Encrypt Report** and enter an **Encryption Code**. The final Excel file will require this code to open, ensuring secure handling of sensitive data.

Because **Salesforce Flow** cannot download encrypted files directly, the encrypted report is **delivered to the user by email**.

At the same time, the same uploaded report is also processed with all selected formatting options applied and is **downloaded normally** for immediate use.

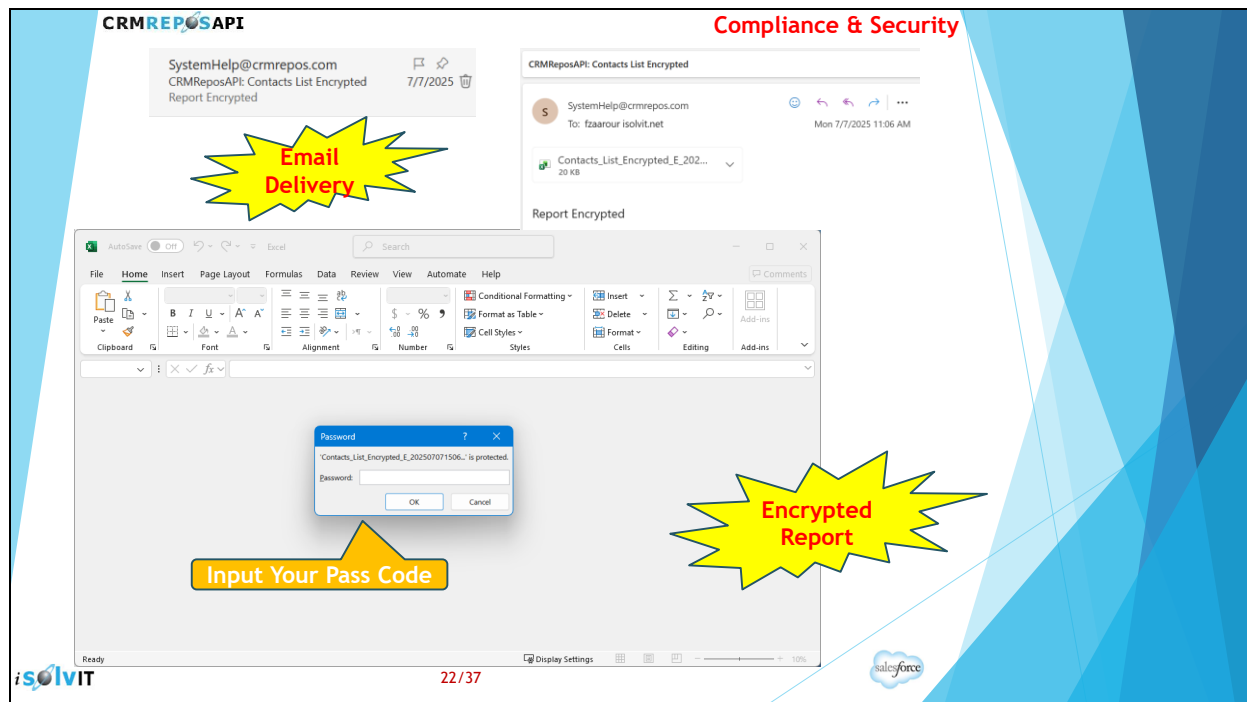


Image 21

Your uploaded report can be downloaded through **Salesforce Flow** with the configured **headers and footers** applied.

Encrypted reports, however, are delivered **by email**, as Flow callouts cannot return encrypted content. For identification purposes, the system automatically appends an “E” to the encrypted file name.

When opening an encrypted Excel file generated by **CRMReposAPI**, you will be prompted to enter the **Encryption Code**. This code serves as the security key applied during processing and is required to unlock and view the report’s contents.

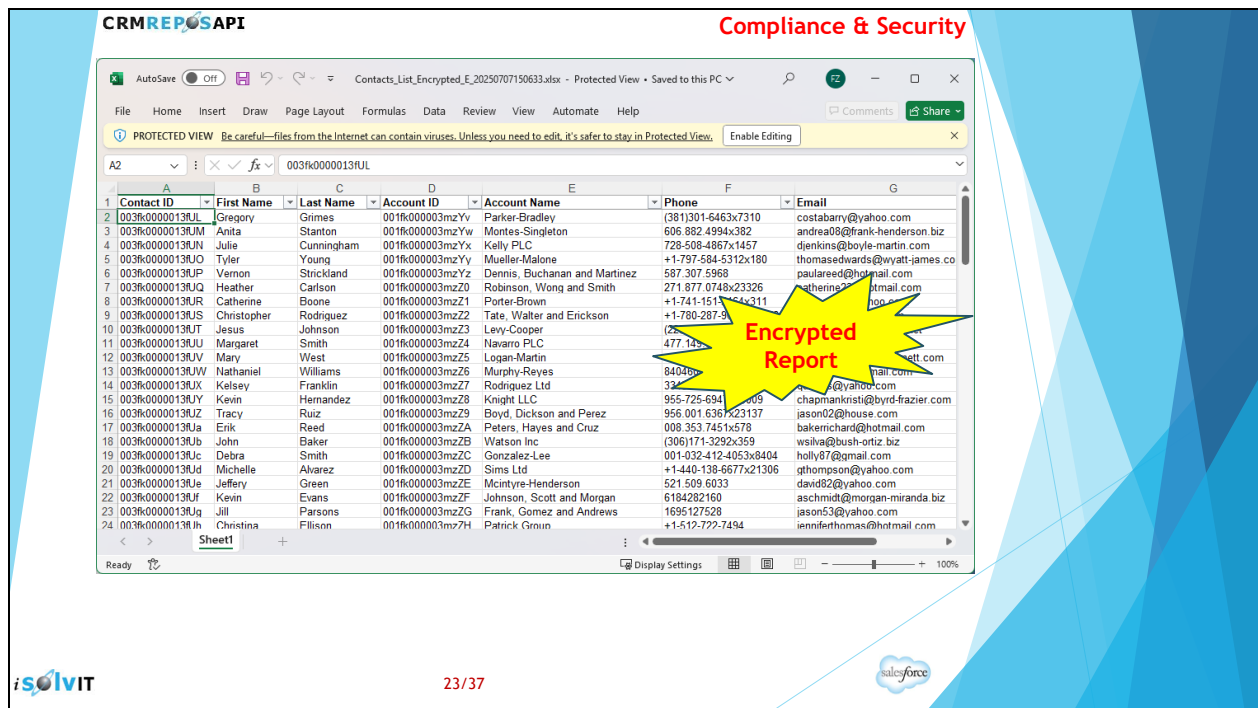


Image 22

The processed report includes both a **header** and a **footer**, ensuring that the final output is **presentation-ready** and **compliance-aligned**.

Each page consistently displays standardized information such as the report name, run date, user, organization details, page numbers, and confidentiality labels. This guarantees a professional appearance while supporting auditability, governance, and regulatory compliance requirements.

CRMREPOSAPI Compliance & Security

Slice & Dice - Smart Report Distribution

“Run your report once. Let CRMReposAPI handle the rest.”

Every time your report includes an **X-variable** (e.g., Recipient Email) and you need to send **Y-specific slices** to different recipients – **Slice & Dice** automatically splits the data and delivers the right slice to each recipient.

Example Use Case: Lead Status Report

Report: All Leads (Status + Owner)
Includes:

- **Status:** New, Aged, Expired
- **Email:** Assigned Salesforce Users

Goal:
Send each user a filtered Excel report showing:

- Only the leads **they own**
- Categorized by **lead status**
- With headers, record count, run date, etc.

CRMReposAPI Flow:

1. You upload or run report.
2. Slice & Dice breaks it by:
 - **Email** (X-variable)
3. Adds dynamic **header/footer** (e.g., “Leads Assigned to John Doe - July 9, 2025”).
4. Sends **each user** their personal report via email.

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Image 23

Slice & Dice automates intelligent report distribution. Instead of manually exporting and filtering the same Salesforce report for multiple users, you simply **run or upload the report once**. The system evaluates the **email address** in the report and automatically slices the data into **personalized datasets**.

Each recipient receives only their relevant slice of the report, complete with a **customized header and footer, record count, and run date**.

This approach transforms a manual, repetitive task into a **fully automated workflow**.

In this example, a **Lead Status** report contains the fields **Status** and **Owner**. The objective is to deliver each Salesforce user only the leads they own. **Slice & Dice** identifies the email address in the first column, filters the report for the corresponding owner, applies dynamic headers and footers, and emails each user their **personalized Excel file**.

No manual filtering, exporting, or post-processing is required.

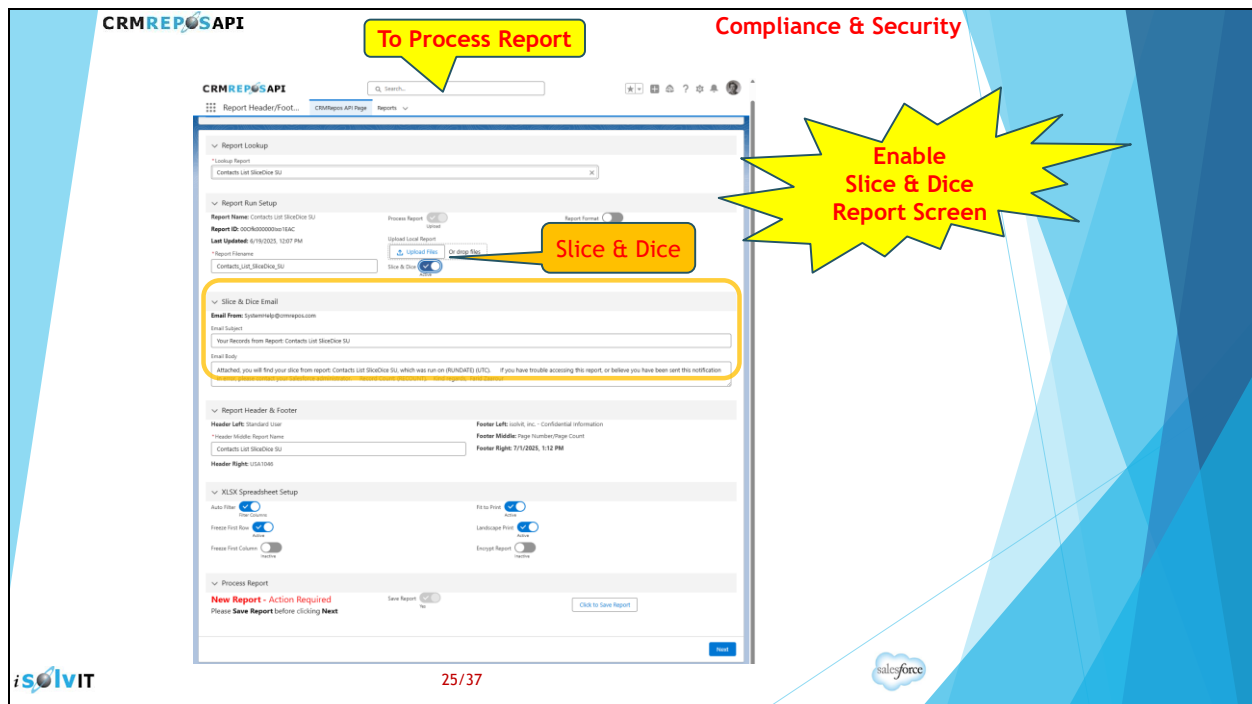


Image 24

Report Formatting Screen

This screen displays the formatting options that **CRMReposAPI** automatically applies to the generated spreadsheet. Available options include enabling **Auto-Filter**, freezing the **first row** and/or **first column**, optimizing the layout for **print output**, and applying a **landscape page orientation** for improved page utilization.

At the top of the screen, you can review the selected **process type**—**Upload** or **Run**—along with the **report format (Tabular only)**. In this example, the report has been uploaded directly from a local device, and **Slice & Dice** is enabled for this upload.

To begin processing, simply **drag and drop** the exported Salesforce report file into the designated area.

The **Header and Footer preview** displays the elements that CRMReposAPI generates automatically. Within this template, only **Report Name** and **File Report Name (Downloaded)** are editable. All other header and footer elements are system-controlled to ensure consistency, standardization, and compliance.

This screen also introduces two additional editable fields: **Email Subject** and **Email Body**, which allow you to customize the message used when distributing the completed report to recipients.

Overall, this screen provides a clear and comprehensive overview of how **CRMReposAPI** structures, formats, and prepares your report before generating the final Excel file.

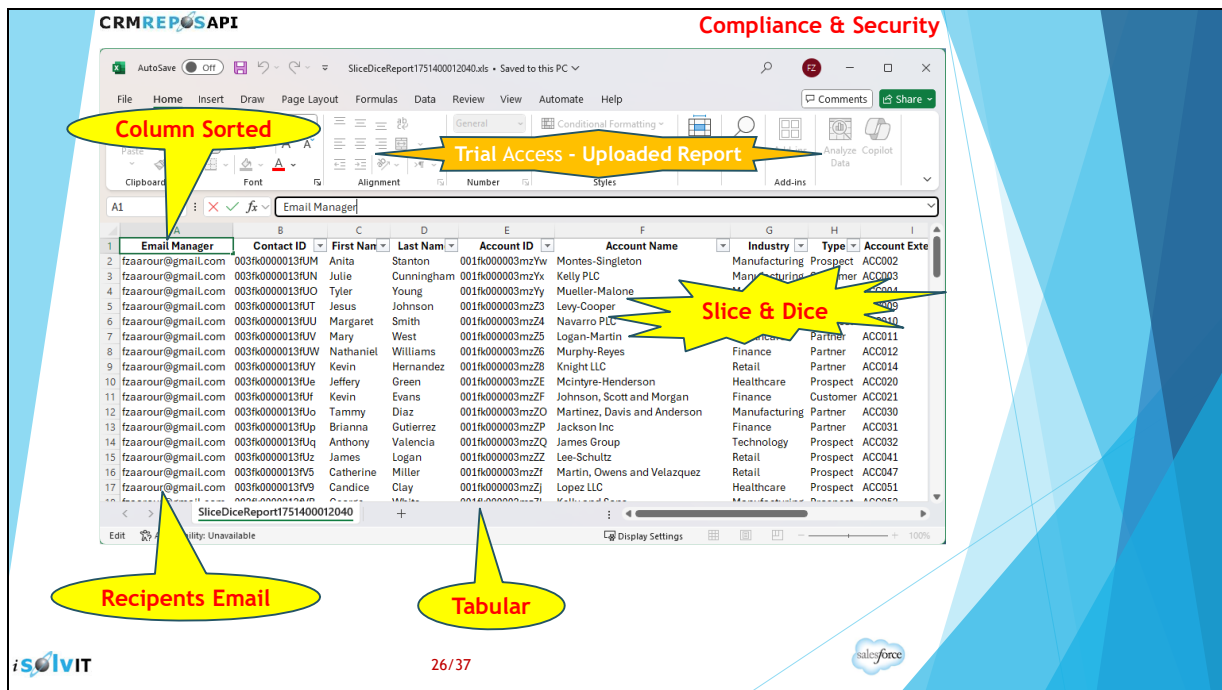


Image 25

Slice & Dice begins by identifying report recipients based on the **email column** in the **tabular report**.

The recipient email column **must be sorted**. Each **unique email address** is treated as an individual recipient and receives a **personalized slice** of the report.

Slice & Dice is available in **trial mode** for **uploaded reports**. During processing, each slice is generated dynamically based on the recipient-specific data contained in the report.

CRMREPOSAPI Compliance & Security

More Recipients

Slice & Dice

	A	B	C	D	E	F	G	H	I
58	fzaarour@isolvit.net	003f0000013fVM	Michael	Price	001f000003mzZw	Scott, Martinez and Martinez	Finance	Partner	ACC064
59	fzaarour@isolvit.net	003f0000013fVQ	James	Snyder	001f000003mzZy	Nunez-Schwartz	Technology	Partner	ACC066
60	fzaarour@isolvit.net	003f0000013fVQ	Elizabeth	Reyes	001f000003mza0	Sanders Group	Finance	Partner	ACC068
61	fzaarour@isolvit.net	003f0000013fVa	Reginald	White	001f000003mzaA	Shah, Valenzuela and Harner	Finance	Partner	ACC068
62	fzaarour@isolvit.net	003f0000013fVb	Reginald	White	001f000003mzaB	Vargas Group	Finance	Partner	ACC068
63	fzaarour@isolvit.net	003f0000013fVc	Reginald	White	001f000003mzaF	Taylor-Arnold	Finance	Partner	ACC068
64	fzaarour@isolvit.net	003f0000013fVd	Reginald	White	001f000003mzaH	Rodriguez and Sons	Finance	Partner	ACC068
65	fzaarour@isolvit.net	003f0000013fVe	Reginald	White	001f000003mzaI	Thompson, Velazquez and Gibson	Retail	Customer	ACC085
66	fzaarour@isolvit.net	003f0000013fVf	Reginald	White	001f000003mzaS	Williams, Gutierrez and James	Finance	Partner	ACC096
67	fzaarour@isolvit.net	003f0000013fVg	Reginald	White	001f000003mzaU	Pierce, Brennan and Perez	Finance	Prospect	ACC098
68	fzaarour@isolvit.net	003f0000013fVh	Reginald	White	001f000003mzaW	Williams Group	Technology	Customer	ACC100
69	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZy	Dennis, Buchanan and Martinez	Technology	Customer	ACC005
70	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZ9	Boyd, Dickson and Perez	Manufacturing	Partner	ACC015
71	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZC	Gonzalez-Lee	Finance	Prospect	ACC018
72	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZG	Frank, Gomez and Andrews	Technology	Customer	ACC022
73	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZL	Cooper Group	Finance	Customer	ACC024
74	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZK	Ellis, Odom and Holloway	Manufacturing	Customer	ACC026
75	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZM	Franklin Ltd	Finance	Partner	ACC027
76	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZM	French-Garcia	Manufacturing	Partner	ACC028
77	fzaarour@yahoo.com	003f0000013fVj	Reginald	White	001f000003mzZM	Higgins-Shelton	Finance	Customer	ACC033

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Image 26

As you can see, additional recipient email addresses and their corresponding record counts are displayed in this example, taken from the Slice & Dice uploaded file that is being processed.

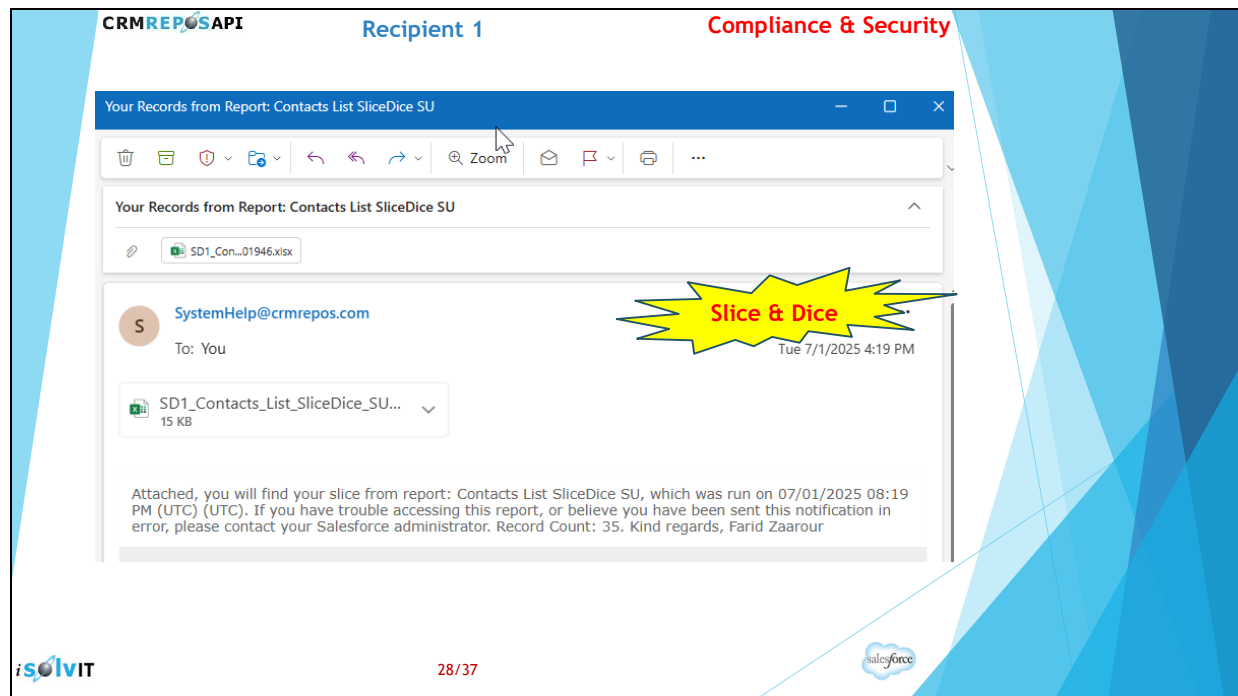


Image 27

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

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

Email To: The Email Address from the first column

Attachment: The sliced report file

Filename: Begins with “SD_” followed by a 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)**

Please note: Both the Email Subject and Email Body are fully customizable for each report.

CRMREPOSAPI Recipient 1 Compliance & Security

Without Recipients Email

Slice & Dice

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External ID	External ID
003k0000013RJM	Stanton	Montes-Singleton	001f0000003mzYw	Kelly PLC	Manufacturing	Prospect	ACC002	ACC002
003k0000013RJN	Young	Cunningham	001f0000003mzYx	Mueller-Malone	Manufacturing	Customer	ACC003	ACC003
003k0000013RJO	Tyler	Young	001f0000003mzYy	Levy-Cooper	Manufacturing	Partner	ACC004	ACC004
003k0000013RJU	Jesus	Johnson	001f0000003mzZ3	Navarro PLC	Retail	Partner	ACC009	ACC009
003k0000013RJV	Margaret	Smith	001f0000003mzZ4	Logan-Martin	Manufacturing	Prospect	ACC020	ACC020
003k0000013RJW	Mary	West	001f0000003mzZ5	Murphy-Reyes	Healthcare	Prospect	ACC021	ACC021
003k0000013RJX	Nathaniel	Williams	001f0000003mzZ6	Knight LLC	Finance	Customer	ACC021	ACC021
003k0000013RJY	Kevin	Hernandez	001f0000003mzZ8	McIntyre-Henderson	Retail	Partner	ACC030	ACC030
003k0000013RJe	Jeffery	Green	001f0000003mzZE	Johnson, Scott and Morgan	Finance	Prospect	ACC031	ACC031
003k0000013RJf	Kevin	Evans	001f0000003mzZF	Martinez, Davis and Anderson	Technology	Prospect	ACC032	ACC032
003k0000013RJg	Tammy	Diaz	001f0000003mzZD	James Group	Retail	Prospect	ACC041	ACC041
003k0000013RJp	Brianna	Gutierrez	001f0000003mzZP	Lee-Schultz	Healthcare	Prospect	ACC047	ACC047
003k0000013RJq	Anthony	Valencia	001f0000003mzZQ	Martin, Owens and Velazquez	Healthcare	Prospect	ACC051	ACC051
003k0000013RJz	James	Logan	001f0000003mzZZ	Kelly and Sons	Manufacturing	Prospect	ACC053	ACC053
003k0000013RVS	Catherine	Miller	001f0000003mzZf	Lopez-Bennett	Finance	Prospect	ACC054	ACC054
003k0000013RVN	Candice	Clay	001f0000003mzZj	Mendoza, Lewis and Rodriguez	Healthcare	Partner	ACC062	ACC062
003k0000013RVB	George	White	001f0000003mzZi	Marsh-Patrick	Manufacturing	Partner	ACC063	ACC063
003k0000013RVC	Latoya	Jordan	001f0000003mzZm	Krueger Inc	Technology	Prospect	ACC065	ACC065
003k0000013RVK	Ananda	Hancock	001f0000003mzZu	Moore-Davis	Finance	Customer	ACC069	ACC069
003k0000013RVL	Darrell	Franco	001f0000003mzZx	Lin, McKenzie and Jones	Healthcare	Partner	ACC070	ACC070
003k0000013RVN	Kelly	Caldwell	001f0000003mzZx	Johnson, Hernandez and Baker	Manufacturing	Prospect	ACC071	ACC071
003k0000013RVR	Ashley	Stanley	001f0000003mza1	Holt and Sons	Technology	Partner	ACC073	ACC073
003k0000013RVS	Meissa	Payne	001f0000003mza2	Martinez LLC	Manufacturing	Customer	ACC074	ACC074
003k0000013RVT	Sydney	Jenkins	001f0000003mza3	Manning Inc	Retail	Customer	ACC076	ACC076
003k0000013RVV	Sarah	Cruz	001f0000003mza5	McIntyre-Henderson	Retail	Partner	ACC077	ACC077
003k0000013RVW	Karen	Washington	001f0000003mza6					
003k0000013RVY	Julian	Glenn	001f0000003mza8					
003k0000013RVZ	Kathy	Munoz	001f0000003mza9					

Ready Accessibility: Good to go Display Settings 100%

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Image 28

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

Image 29

These optimizations include standardized header and footer elements, frozen rows and columns, optimized page layout, and print-ready formatting. The result is a consistent, professional, and compliant Excel report that is immediately ready for distribution, review, and printing without any additional manual adjustments.

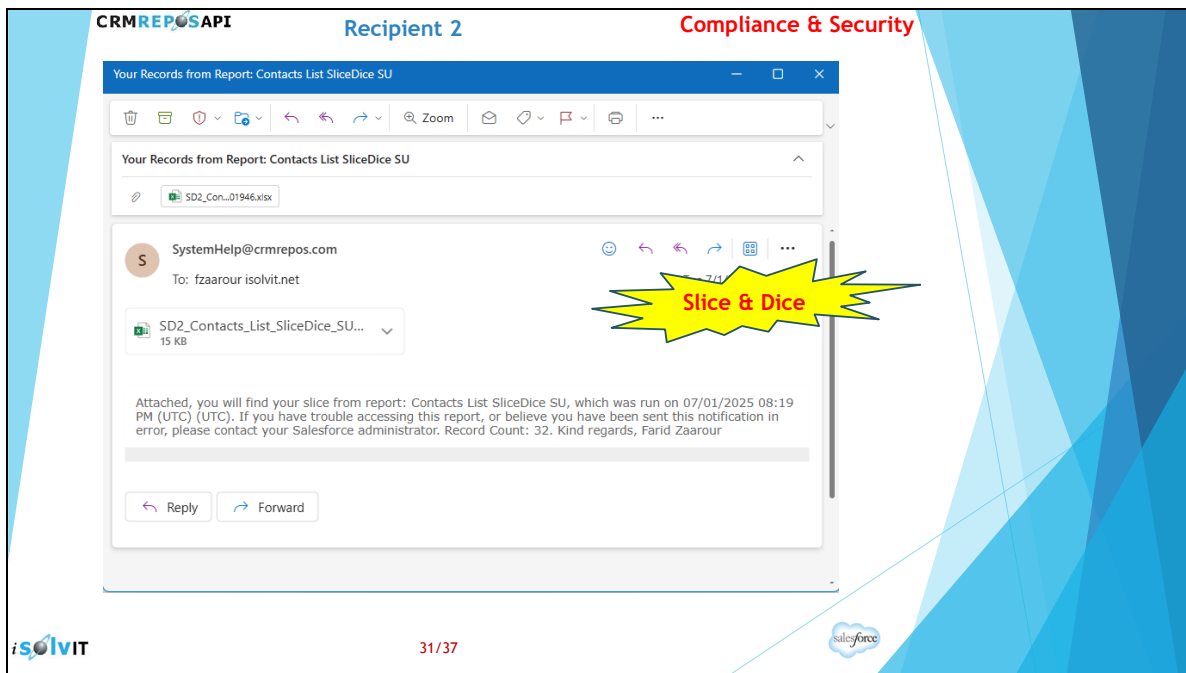


Image 30

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

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

Email To: The Email Address from the first column

Attachment: The sliced report file

Filename: Begins with “SD_” followed by a 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)**

Please note: Both the Email Subject and Email Body are fully customizable for each report.

CRMREPOSAPI Recipient 2 Compliance & Security

AutoSave OFF SD2_Contacts_List_SliceDice_SU_20250701201946.xlsx • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles

Conditional Formatting Insert Delete Editing Add-ins Analyze Copilot Data

Comments Share

003f60000013HJL

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id	External Id
003f60000013HJL	Gregory	Grimes	001k000003mzYv	Parker-Bradley	Finance	Customer	ACC001	ACC001
003f60000013HJL	Heather	Carlson	001k000003mzZ0	Robinson, Wong and Smith	Retail	Partner	ACC006	ACC006
003f60000013HJL	Catherine	Boone	001k000003mzZ1	Porter-Brown	Retail	Customer	ACC007	ACC007
003f60000013HJL	Christopher	Rodriguez	001k000003mzZ2	Tate, Walter and Erickson	Manufacturing	Partner	ACC008	ACC008
003f60000013HJL	Kelsey	Franklin	001k000003mzZ7	Rodriguez Ltd	Retail	Customer	ACC008	ACC008
003f60000013HJL	Erik	Reed	001k000003mzZA	Peters, Hayes and Cruz	Healthcare	Prospect	ACC008	ACC008
003f60000013HJL	John	Baker	001k000003mzZB	Watson Inc	Retail	Prospect	ACC008	ACC008
003f60000013HJL	Michelle	Alvarez	001k000003mzZD	Sims Ltd	Retail	Customer	ACC008	ACC008
003f60000013HJL	Christina	Elison	001k000003mzZH	Patrick Group	Healthcare	Customer	ACC008	ACC008
003f60000013HJL	Natalie	Dillon	001k000003mzZJ	Smith, Reynolds and Carlson	Technology	Partner	ACC008	ACC008
003f60000013HJL	Kevin	Smith	001k000003mzZN	Powell, Chen and Wagner	Healthcare	Customer	ACC029	ACC029
003f60000013HJL	Matthew	Garcia	001k000003mzZT	Richardson-Hall	Finance	Customer	ACC035	ACC035
003f60000013HJL	Walter	Mendoza	001k000003mzZV	Spencer and Sons	Healthcare	Partner	ACC037	ACC037
003f60000013HJL	Robert	Olsen	001k000003mzZY	Nguyen, Hensley and Jackson	Healthcare	Prospect	ACC040	ACC040
003f60000013HJL	Tammy	Mccall	001k000003mzZa	Young, Reed and Brown	Healthcare	Customer	ACC042	ACC042
003f60000013HJL	Rachel	Bentley	001k000003mzZc	Perez-Lopez	Retail	Partner	ACC044	ACC044
003f60000013HJL	Diana	Miller	001k000003mzZg	Shaffer Group	Retail	Partner	ACC048	ACC048
003f60000013HJL	Julian	Phillips	001k000003mzZh	Stevens-Martin	Technology	Partner	ACC049	ACC049
003f60000013HJL	Connie	Watson	001k000003mzZi	Nunez-Garcia	Technology	Partner	ACC050	ACC050
003f60000013HJL	Jeffrey	Harrison	001k000003mzZp	Wise, Dillon and Morris	Retail	Prospect	ACC057	ACC057
003f60000013HJL	Alan	Wilson	001k000003mzZq	Webb Inc	Technology	Customer	ACC058	ACC058
003f60000013HJL	Michael	Price	001k000003mzZw	Scott, Martinez and Martinez	Finance	Partner	ACC064	ACC064
003f60000013HJL	James	Snyder	001k000003mzZy	Nunez-Schwartz	Technology	Partner	ACC066	ACC066
003f60000013HJL	Elizabeth	Reyes	001k000003mzZa	Sanders Group	Finance	Prospect	ACC068	ACC068
003f60000013HJL	Reginald	White	001k000003mzZb	Shah, Valenzuela and Harper	Retail	Partner	ACC078	ACC078
003f60000013HJL	Evelyn	Stout	001k000003mzZc	Vargas Group	Retail	Prospect	ACC079	ACC079
003f60000013HJL	Christopher	Peck	001k000003mzZd	Taylor-Arnold	Manufacturing	Customer	ACC083	ACC083
003f60000013HJL	Brandon	Smith	001k000003mzZe	Rodriguez and Sons	Finance	Prospect	ACC085	ACC085
003f60000013HJL	Alan	Acevedo	001k000003mzZf	Thompson, Velazquez and Gibson	Retail	Customer	ACC086	ACC086
003f60000013HJL	Craig	Russell	001k000003mzZg	Williams, Gutierrez and James	Finance	Partner	ACC096	ACC096
003f60000013HJL	Kenneth	Rodriguez	001k000003mzZh	Pierce, Brennan and Perez	Finance	Prospect	ACC098	ACC098
003f60000013HJL	Jeffrey	Roy	001k000003mzZi	Williams Group	Technology	Customer	ACC100	ACC100

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Slice & Dice

Display Settings

100%

Accessibility: Good to go

salesforce

Image 31

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

CRMREPOSAPI Recipient 2 Compliance & Security

Standard User Contacts List Worksheet 1/1 1/1/2018

ID	Name	Email	Account ID	Account Name	Company	Type	Account ID	Account Name	Phone	Notes
1111111111	John Doe	john.doe@company.com	1111111111	Company A	Company A	Lead	1111111111	Company A	1111111111	
1111111112	Jane Smith	jane.smith@company.com	1111111112	Company B	Company B	Lead	1111111112	Company B	1111111112	
1111111113	John Doe	john.doe@company.com	1111111113	Company C	Company C	Lead	1111111113	Company C	1111111113	
1111111114	Jane Smith	jane.smith@company.com	1111111114	Company D	Company D	Lead	1111111114	Company D	1111111114	
1111111115	John Doe	john.doe@company.com	1111111115	Company E	Company E	Lead	1111111115	Company E	1111111115	
1111111116	Jane Smith	jane.smith@company.com	1111111116	Company F	Company F	Lead	1111111116	Company F	1111111116	
1111111117	John Doe	john.doe@company.com	1111111117	Company G	Company G	Lead	1111111117	Company G	1111111117	
1111111118	Jane Smith	jane.smith@company.com	1111111118	Company H	Company H	Lead	1111111118	Company H	1111111118	
1111111119	John Doe	john.doe@company.com	1111111119	Company I	Company I	Lead	1111111119	Company I	1111111119	
1111111120	Jane Smith	jane.smith@company.com	1111111120	Company J	Company J	Lead	1111111120	Company J	1111111120	
1111111121	John Doe	john.doe@company.com	1111111121	Company K	Company K	Lead	1111111121	Company K	1111111121	
1111111122	Jane Smith	jane.smith@company.com	1111111122	Company L	Company L	Lead	1111111122	Company L	1111111122	
1111111123	John Doe	john.doe@company.com	1111111123	Company M	Company M	Lead	1111111123	Company M	1111111123	
1111111124	Jane Smith	jane.smith@company.com	1111111124	Company N	Company N	Lead	1111111124	Company N	1111111124	
1111111125	John Doe	john.doe@company.com	1111111125	Company O	Company O	Lead	1111111125	Company O	1111111125	
1111111126	Jane Smith	jane.smith@company.com	1111111126	Company P	Company P	Lead	1111111126	Company P	1111111126	
1111111127	John Doe	john.doe@company.com	1111111127	Company Q	Company Q	Lead	1111111127	Company Q	1111111127	
1111111128	Jane Smith	jane.smith@company.com	1111111128	Company R	Company R	Lead	1111111128	Company R	1111111128	
1111111129	John Doe	john.doe@company.com	1111111129	Company S	Company S	Lead	1111111129	Company S	1111111129	
1111111130	Jane Smith	jane.smith@company.com	1111111130	Company T	Company T	Lead	1111111130	Company T	1111111130	
1111111131	John Doe	john.doe@company.com	1111111131	Company U	Company U	Lead	1111111131	Company U	1111111131	
1111111132	Jane Smith	jane.smith@company.com	1111111132	Company V	Company V	Lead	1111111132	Company V	1111111132	
1111111133	John Doe	john.doe@company.com	1111111133	Company W	Company W	Lead	1111111133	Company W	1111111133	
1111111134	Jane Smith	jane.smith@company.com	1111111134	Company X	Company X	Lead	1111111134	Company X	1111111134	
1111111135	John Doe	john.doe@company.com	1111111135	Company Y	Company Y	Lead	1111111135	Company Y	1111111135	
1111111136	Jane Smith	jane.smith@company.com	1111111136	Company Z	Company Z	Lead	1111111136	Company Z	1111111136	
1111111137	John Doe	john.doe@company.com	1111111137	Company A	Company A	Lead	1111111137	Company A	1111111137	
1111111138	Jane Smith	jane.smith@company.com	1111111138	Company B	Company B	Lead	1111111138	Company B	1111111138	
1111111139	John Doe	john.doe@company.com	1111111139	Company C	Company C	Lead	1111111139	Company C	1111111139	
1111111140	Jane Smith	jane.smith@company.com	1111111140	Company D	Company D	Lead	1111111140	Company D	1111111140	
1111111141	John Doe	john.doe@company.com	1111111141	Company E	Company E	Lead	1111111141	Company E	1111111141	
1111111142	Jane Smith	jane.smith@company.com	1111111142	Company F	Company F	Lead	1111111142	Company F	1111111142	
1111111143	John Doe	john.doe@company.com	1111111143	Company G	Company G	Lead	1111111143	Company G	1111111143	
1111111144	Jane Smith	jane.smith@company.com	1111111144	Company H	Company H	Lead	1111111144	Company H	1111111144	
1111111145	John Doe	john.doe@company.com	1111111145	Company I	Company I	Lead	1111111145	Company I	1111111145	
1111111146	Jane Smith	jane.smith@company.com	1111111146	Company J	Company J	Lead	1111111146	Company J	1111111146	
1111111147	John Doe	john.doe@company.com	1111111147	Company K	Company K	Lead	1111111147	Company K	1111111147	
1111111148	Jane Smith	jane.smith@company.com	1111111148	Company L	Company L	Lead	1111111148	Company L	1111111148	
1111111149	John Doe	john.doe@company.com	1111111149	Company M	Company M	Lead	1111111149	Company M	1111111149	
1111111150	Jane Smith	jane.smith@company.com	1111111150	Company N	Company N	Lead	1111111150	Company N	1111111150	

Slice & Dice

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Image 32

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

These optimizations ensure that each personalized report is immediately usable and presentation ready. They include consistent header and footer information, frozen rows for easier on-screen navigation, optimized page layout for printing, and standardized formatting that supports clarity, usability, and compliance—without requiring any manual adjustments after delivery.

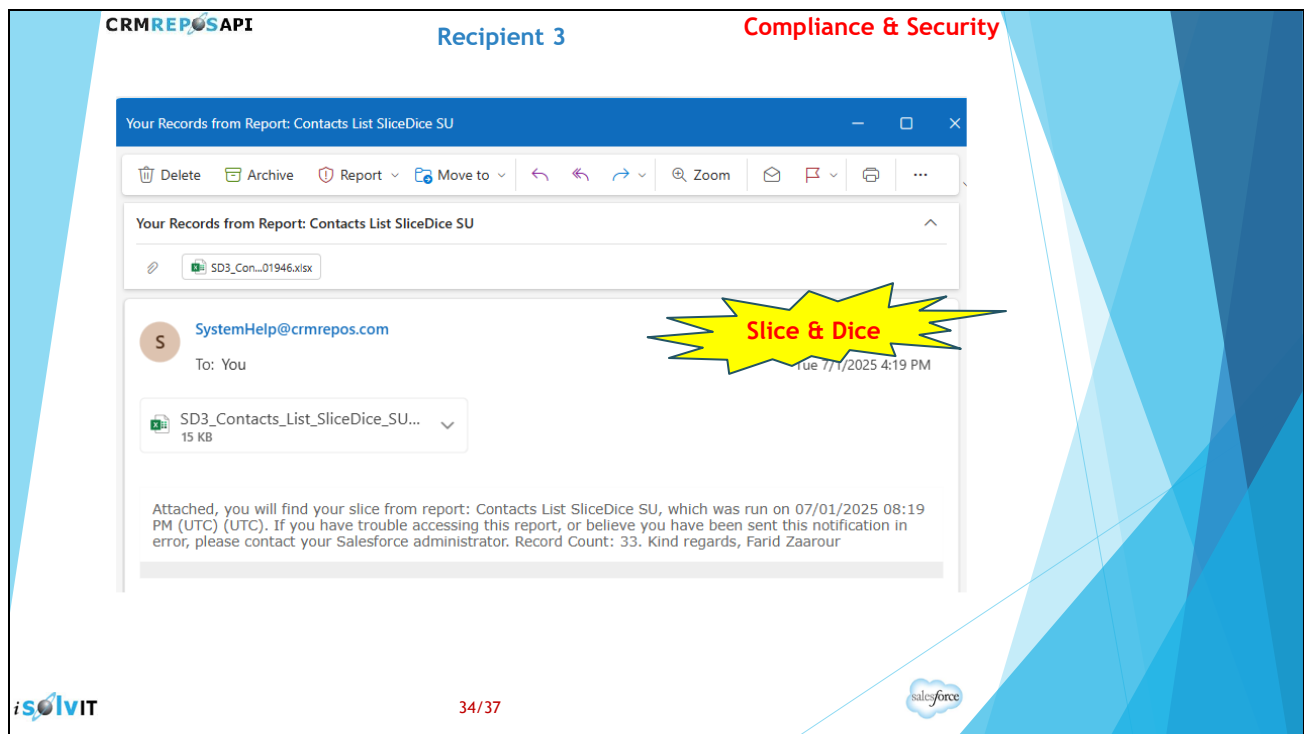


Image 33

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

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

Email To: The Email Address from the first column

Attachment: The sliced report file

Filename: Begins with “SD_” followed by a 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)**

Please note: Both the Email Subject and Email Body are fully customizable for each report.

CRMREPOSAPI Recipient 3 Compliance & Security

AutoSave Off 503_Contacts_List_SliceDice_SU_20250701201946.xlsx • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles Cells Editing Add-ins Analyze Copilot

003K0000013RUP

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account External Id	External Id
003K0000013RUP	John	Strickland	001K000003mZyZ	Dennis, Buchanan and Martinez	Technology	Customer	ACC005	ACC005
003K0000013RJJ	Tracy	Ruiz	001K000003mZ99	Boyd, Dickson and Perez	Manufacturing	Partner	ACC015	ACC015
003K0000013RUC	Debra	Smith	001K000003mZCZ	Gonzalez Lee	Finance	Prospect	ACC018	ACC018
003K0000013RJL	Jill	Parsons	001K000003mZGZ	Frank, Gomez and Andrews	Technology	Customer	ACC022	ACC022
003K0000013RJI	Paul	Hernandez	001K000003mZJL	Cooper Group	Finance	Customer	ACC024	ACC024
003K0000013RJK	Heather	Arellano	001K000003mZKZ	Ellis, Odum and Holloway	Manufacturing	Customer	ACC025	ACC025
003K0000013RJI	Philip	Garcia	001K000003mZLZ	Franklin Ltd	Finance	Partner	ACC026	ACC026
003K0000013RJM	Kelly	Schultz	001K000003mZMZ	French-Garcia	Manufacturing	Partner	ACC027	ACC027
003K0000013RJr	John	Cole	001K000003mZNR	Higgins-Shelton	Finance	Customer	ACC028	ACC028
003K0000013RJI	Ricardo	Wright	001K000003mZUJ	Hall, Jones and Williams	Finance	Partner	ACC029	ACC029
003K0000013RJw	Matthew	White	001K000003mZVJ	Cooper Group	Finance	Partner	ACC030	ACC030
003K0000013RJx	Stephen	Taylor	001K000003mZXX	Crawford, Jennings and McDaniel	Manufacturing	Prospect	ACC038	ACC038
003K0000013RJy	Jeremy	White	001K000003mZYZ	Holland, Turner and Jimenez	Finance	Prospect	ACC039	ACC039
003K0000013RJZ	Donna	Leonard	001K000003mZaZ	Franco, Williams and Banks	Technology	Partner	ACC043	ACC043
003K0000013RJ1	Vanessa	Walker	001K000003mZbZ	Davis and Sons	Finance	Partner	ACC045	ACC045
003K0000013RJ2	Michael	Rodriguez	001K000003mZcZ	Davis LLC	Healthcare	Partner	ACC046	ACC046
003K0000013RJ3	Elizabeth	Adkins	001K000003mZdZ	Brewer Ltd	Healthcare	Customer	ACC052	ACC052
003K0000013RJ4	Dane	Aula	001K000003mZeZ	Baker, Little and Rubio	Manufacturing	Customer	ACC055	ACC055
003K0000013RJ5	Neil	Brown	001K000003mZfZ	Brown-Jenkins	Manufacturing	Partner	ACC056	ACC056
003K0000013RJ6	Devin	Ramirez	001K000003mZgZ	Elliott Ltd	Manufacturing	Partner	ACC059	ACC059
003K0000013RJ7	Jeremiah	Ayala	001K000003mZhZ	Bradford PLC	Retail	Prospect	ACC060	ACC060
003K0000013RJ8	Jamie	Arroyo	001K000003mZiZ	Gonzalez LLC	Finance	Customer	ACC061	ACC061
003K0000013RJ9	Katie	Castillo	001K000003mZjZ	Hinton, Coleman and Chambers	Retail	Partner	ACC067	ACC067
003K0000013RJA	Anthony	Martinez	001K000003mZkZ	Franklin Ltd	Manufacturing	Customer	ACC072	ACC072
003K0000013RJB	David	Burns	001K000003mZlZ	Greer Inc	Retail	Customer	ACC075	ACC075
003K0000013RJC	Amanda	Espinosa	001K000003mZmZ	Bradley, Lee and Camacho	Manufacturing	Prospect	ACC080	ACC080
003K0000013RJD	Mark	Maxwell	001K000003mZnZ	Clark-Robbins	Manufacturing	Partner	ACC082	ACC082
003K0000013RJE	Brian	Smith	001K000003mZoZ	Becker Group	Technology	Partner	ACC089	ACC089
003K0000013RJE	Gary	Mitchell	001K000003mZpZ	Adams Group	Retail	Customer	ACC091	ACC091
003K0000013RJE	David	Smith	001K000003mZqZ	Daniels, Banks and Welch	Retail	Prospect	ACC093	ACC093
003K0000013RJE	Carlos	Bennett	001K000003mZrZ	Brown Inc	Healthcare	Prospect	ACC094	ACC094
003K0000013RJE	Kathy	OConnell	001K000003mZsZ	Fleming, Carroll and Manning	Healthcare	Customer	ACC095	ACC095
003K0000013RJE			001K000003mZtZ	Banks Inc	Finance	Prospect	ACC099	ACC099

Slice & Dice

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iSOLVIT salesforce

Image 34

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.

Image 35

These optimizations ensure that each personalized report is print-ready and presentation-ready, with consistent page layout, proper scaling, and standardized formatting that supports clarity, usability, and compliance without requiring any manual adjustments.

CRMREPOS API

Compliance & Security

[Click to Contact Us](#)

1 Contact Info

Company Name:

First Name:

Last Name:

Email Address:

Phone #:

2 Reason

Select Reason:

Comment:

Submit

iSOLVIT

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salesforce

Image 36

For assistance, questions, or feature requests, please **Contact Us** to reach our support team. We are here to help.

Click the following link to **Open a Request**.

<https://isolvit.net/contactus.html>