

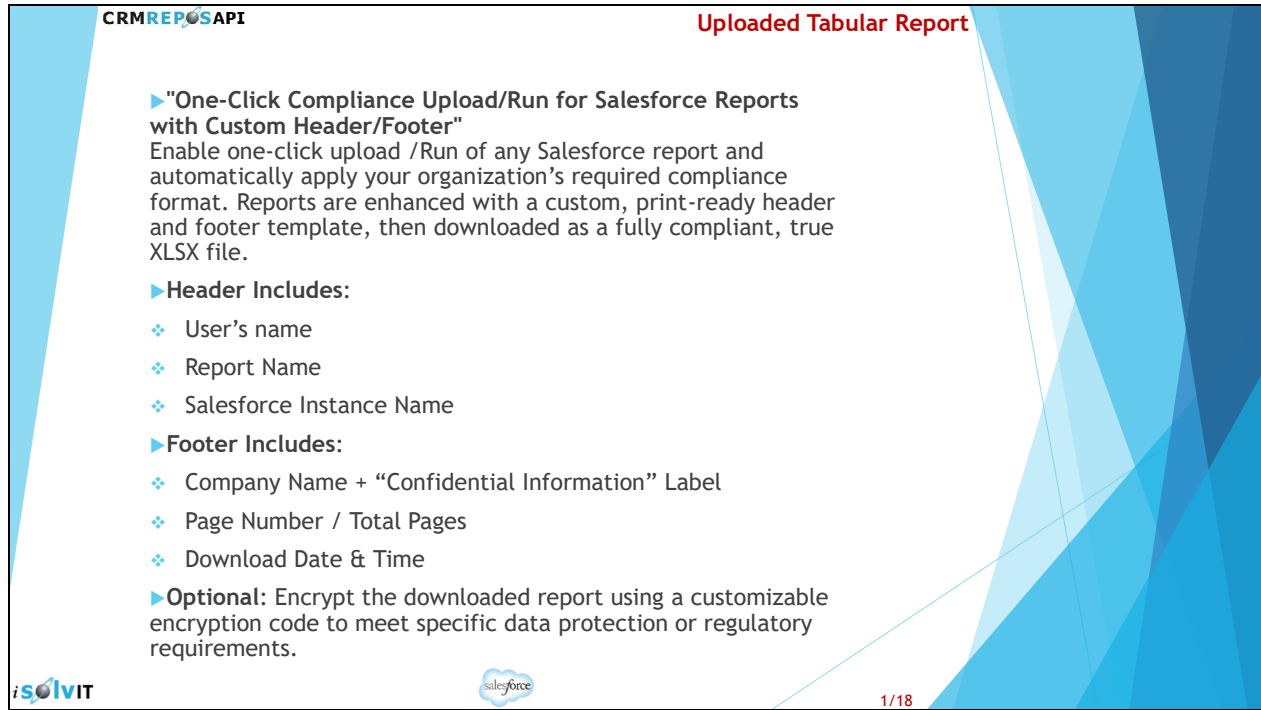


Image 1

Tabular Report Processing with CRMReposAPI

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

The **Tabular Report** workflow is designed for reports that prioritize data extraction, analysis, and downstream processing rather than visual grouping.

CRMReposAPI augments Tabular Reports with standardized headers and footers, consistent formatting, and Excel-specific layout optimizations, producing outputs that are easy to review, share, and print—without modifying the underlying data or analytical meaning.

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).

Optional Feature

Encryption: Users may choose to enable encryption and apply a custom encryption code. When enabled, the final XLSX file will require the code to open, adding an additional layer of data protection

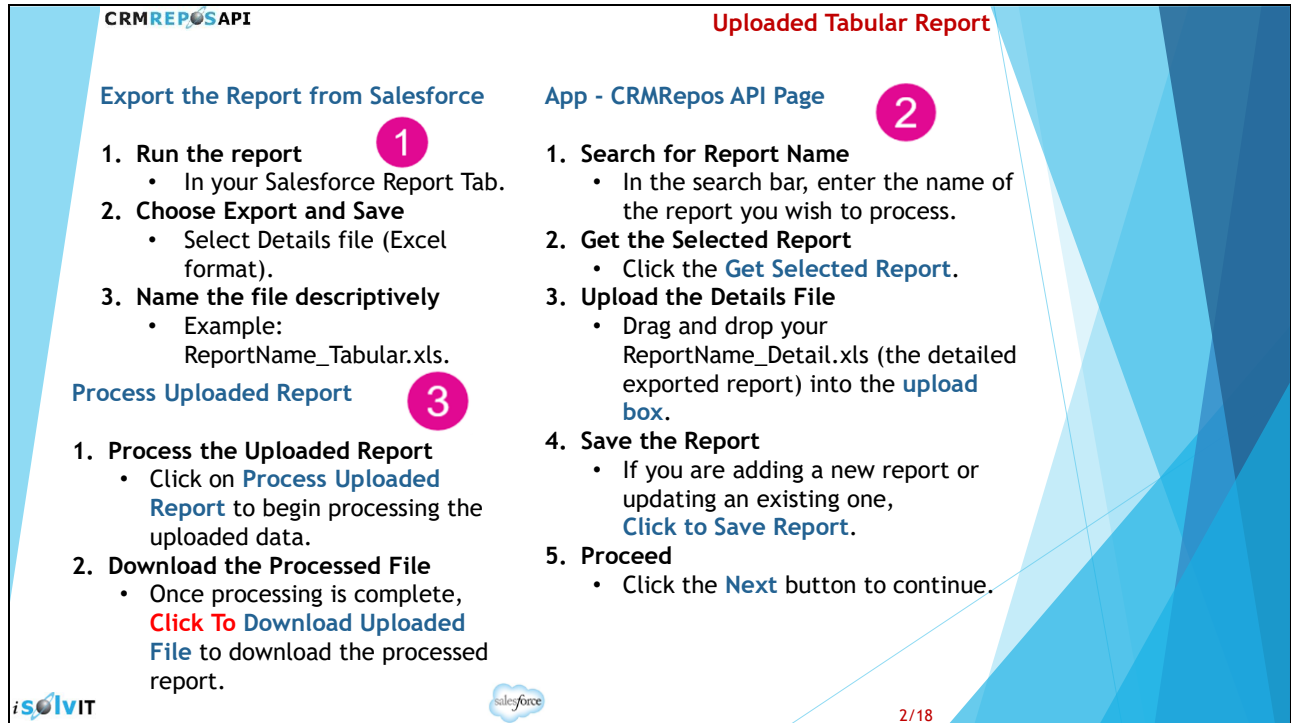


Image 2

Processing a Tabular Salesforce Report with CRMReposAPI

This screen presents the complete end-to-end workflow for processing a **Tabular Salesforce Report** using CRMReposAPI.

Step 1: Export the Report from Salesforce

Begin in Salesforce by running the desired report. Export the report in **Excel (Details)** format and save it locally using a clear, descriptive filename.

Step 2: Load the Report Configuration

Navigate to the **CRMReposAPI App Page**.

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

Step 3: Upload the Report File

Drag and drop the exported Excel file into the upload area.

Set the **Report Format** to **Tabular** to ensure CRMReposAPI applies the appropriate headers, footers, and tabular-specific formatting rules.

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

Step 4: Process the Report

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

CRMReposAPI reads the uploaded data, applies all configured tabular formatting logic, and generates the final Excel output.

Step 5: Download the Final Excel File

Once processing is complete, **Click To Download Uploaded File** to retrieve the finished XLSX report.

The resulting file is clean, structured, and print-ready, with standardized headers and footers applied—without altering the underlying data or requiring any manual cleanup.

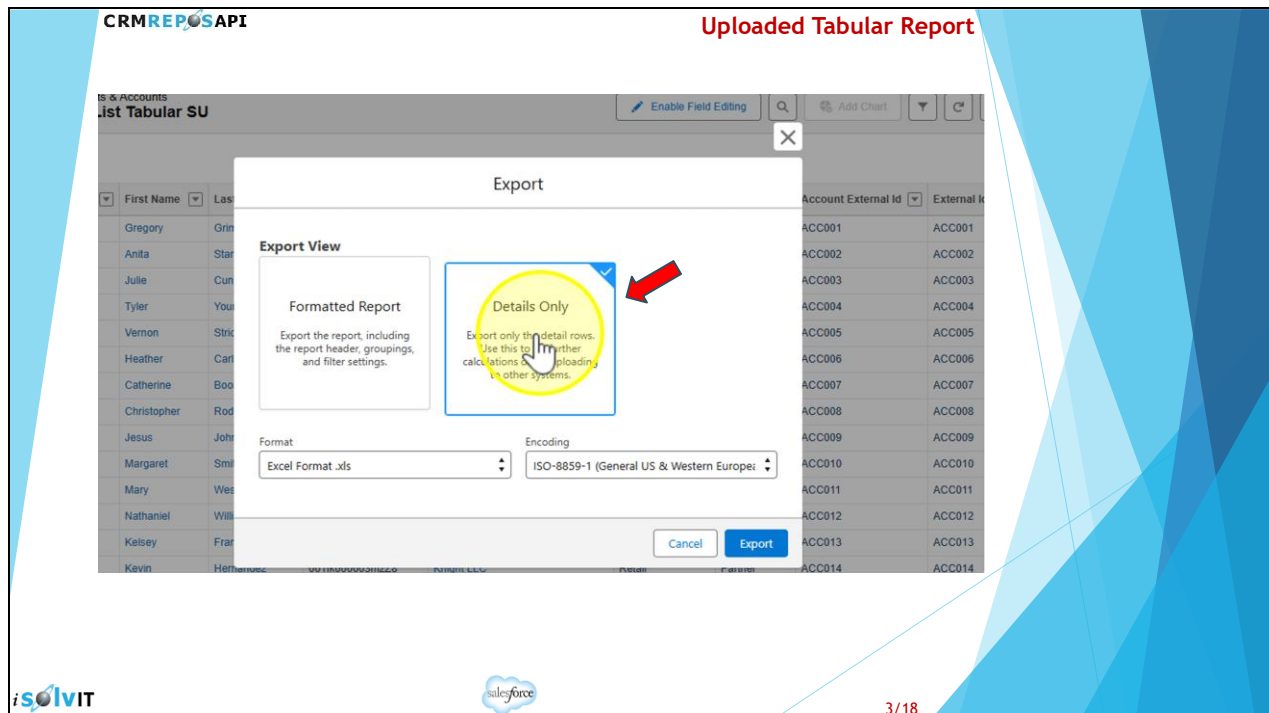


Image 3

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

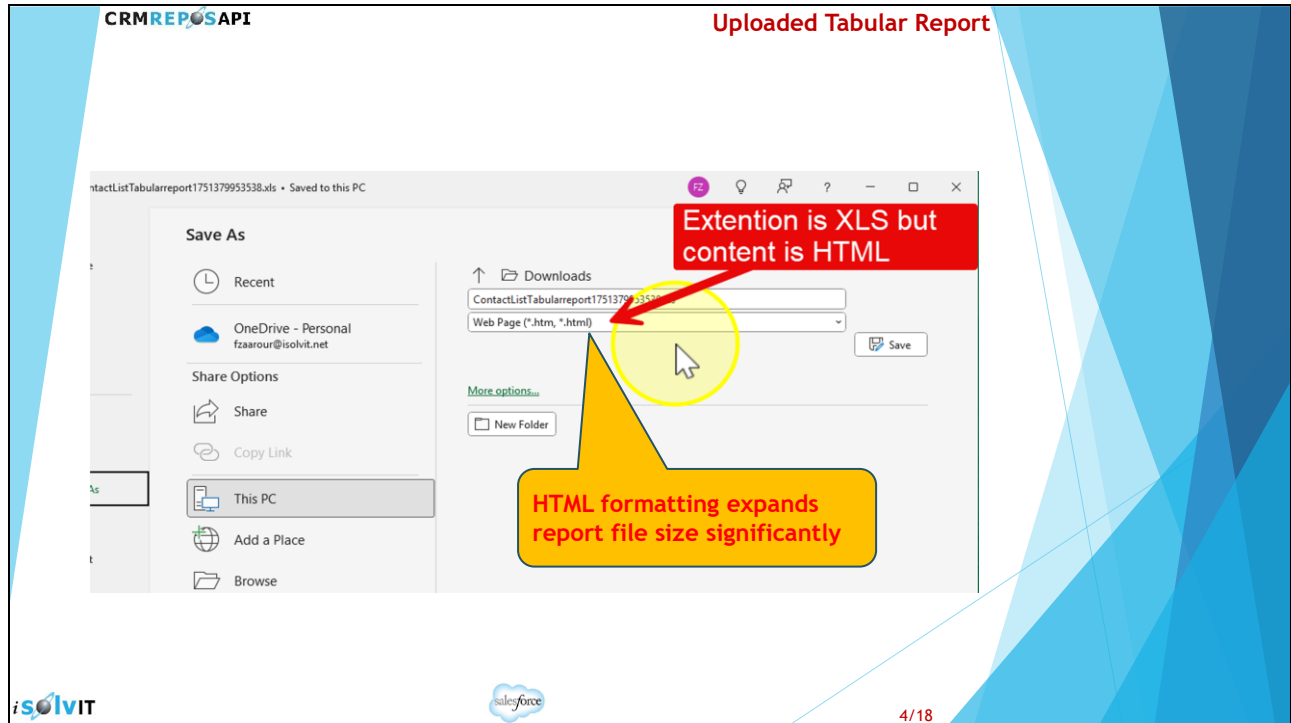


Image 4

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.

CRMREPOSAPI

Uploaded Tabular Report

Before

No Header

No Footer

No Fit to Print

1 of 8

5/18

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type
003H0000013HUL	Gregory	Grimes	001H0000003mzfv	Parker-Bradley	Finance	Customer
003H0000013HUM	Anita	Stanton	001H0000003mzfv	Montes-Singleton	Manufacturing	Prospect
003H0000013HUN	Julie	Cunningham	001H0000003mzfv	Kelly PLC	Manufacturing	Customer
003H0000013HJO	Tyler	Young	001H0000003mzfv	Muller-Malone	Manufacturing	Partner
003H0000013HJP	Vernon	Strickland	001H0000003mzfv	Dennis, Buchanan and Martinez	Technology	Customer
003H0000013HUQ	Heather	Carlson	001H0000003mz20	Robinson, Wong and Smith	Retail	Partner
003H0000013HUR	Catherine	Boone	001H0000003mz21	Porter-Brown	Retail	Customer
003H0000013HUS	Christopher	Rodriguez	001H0000003mz22	Tate, Walter and Erickson	Manufacturing	Partner
003H0000013HUT	Jesus	Johnson	001H0000003mz23	Lewy-Cooper	Retail	Partner
003H0000013HUU	Margaret	Smith	001H0000003mz24	Navarro PLC	Manufacturing	Prospect
003H0000013HUV	Mary	West	001H0000003mz25	Logan-Martin	Healthcare	Partner
003H0000013HUV	Nathaniel	Williams	001H0000003mz26	Murphy-Royes	Finance	Partner
003H0000013HUK	Kelsey	Franklin	001H0000003mz27	Rodriguez Ltd	Retail	Customer
003H0000013HUF	Kevin	Hernandez	001H0000003mz28	Knight LLC	Retail	Partner
003H0000013HUL	Tacy	Ruiz	001H0000003mz29	Boyd, Dickson and Perez	Manufacturing	Partner
003H0000013HUA	Bik	Reed	001H0000003mz2A	Peters, Hayes and Cruz	Healthcare	Prospect
003H0000013HUB	John	Baker	001H0000003mz2B	Watson Inc	Retail	Prospect
003H0000013HUC	Debra	Smith	001H0000003mz2C	Gonzalez-Lee	Finance	Prospect
003H0000013HUC	Michelle	Alvarez	001H0000003mz2D	Sims Ltd	Retail	Prospect
003H0000013HUC	Jeffery	Green	001H0000003mz2E	McIntyre-Henderson	Healthcare	Prospect
003H0000013HUF	Kevin	Evans	001H0000003mz2F	Johnson, Scott and Morgan	Finance	Customer
003H0000013HUG	Jill	Parsons	001H0000003mz20	Frank, Gomez and Andrews	Technology	Customer
003H0000013HUN	Christina	Elison	001H0000003mz2H	Patrick Group	Healthcare	Customer
003H0000013HUN	Paul	Hernandez	001H0000003mz2I	Cooper Group	Finance	Customer
003H0000013HUG	Natalie	Dillon	001H0000003mz2J	Smith, Reynolds and Carlson	Technology	Partner
003H0000013HUK	Heather	Arellano	001H0000003mz2K	Ellis, Odom and Holloway	Manufacturing	Customer
003H0000013HUK	Philip	Garcia	001H0000003mz2L	Franklin Ltd	Finance	Partner
003H0000013HUN	Kelly	Schultz	001H0000003mz2M	French-Garcia	Manufacturing	Partner
003H0000013HUN	Kevin	Smith	001H0000003mz2N	Powell, Chen and Wagner	Healthcare	Customer

Image 5

Tabular Report Before Formatting

This view shows the Tabular report **before** CRMReposAPI formatting is applied. The print preview illustrates exactly how the report would appear if printed in its original exported state, including column alignment, page breaks, and overall layout.

In this unformatted state, the exported report includes **no header and no footer** and is **not optimized for printing**. Page orientation is not adjusted, causing Portrait or Landscape layouts to span across multiple pages. As a result, columns may be split across pages, and the report lacks a consistent, print-ready structure.

This preview highlights the limitations of native Salesforce Tabular exports prior to processing through CRMReposAPI.

CRMREPOSAPI

Uploaded Tabular Report

Standard User

Contracts List Tabular

USABIR

Header

Column Header on each Page

After

Fit to Print

Footer

1 of 2

6/18

Image 6

Print Preview

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.

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)

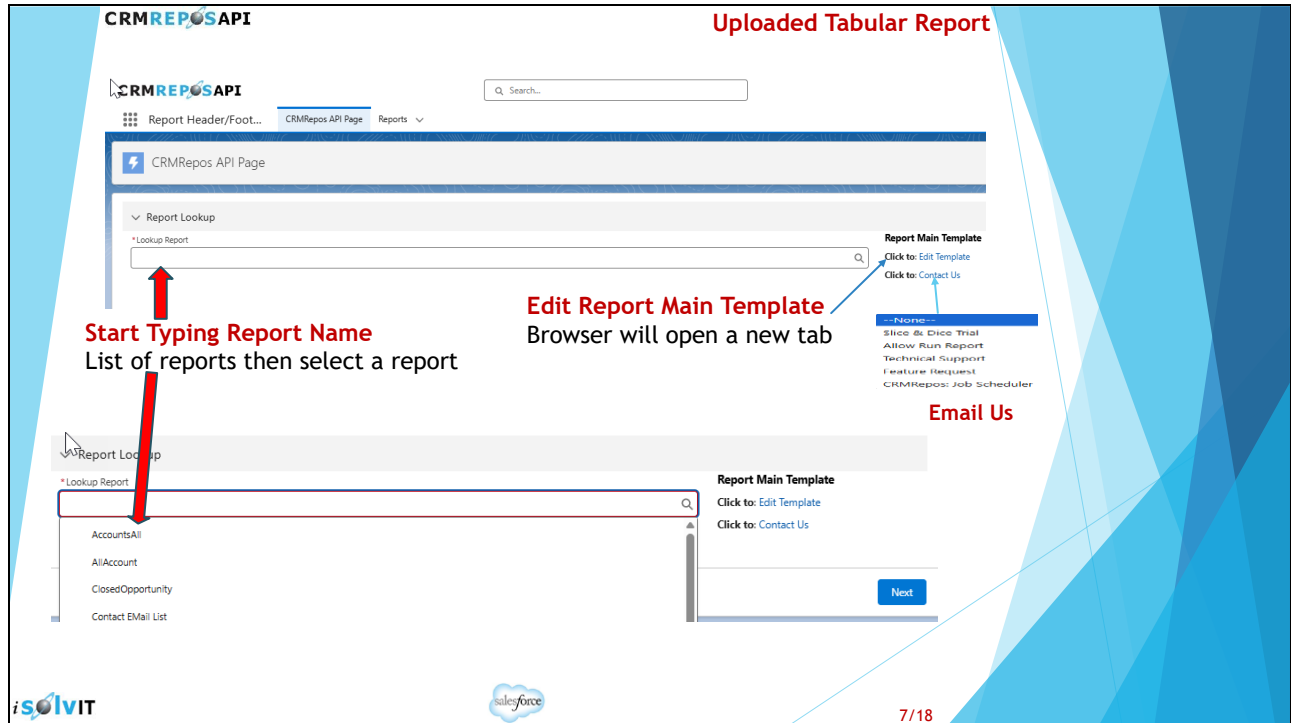


Image 7

Initial Landing Page – Lookup Report Behavior

On the initial landing page, the **Lookup Report** field displays two quick-access options: **Edit Template** and **Contact Us**.

As soon as you begin typing a report name, these links automatically hide, and a smart dropdown appears to filter and display matching reports.

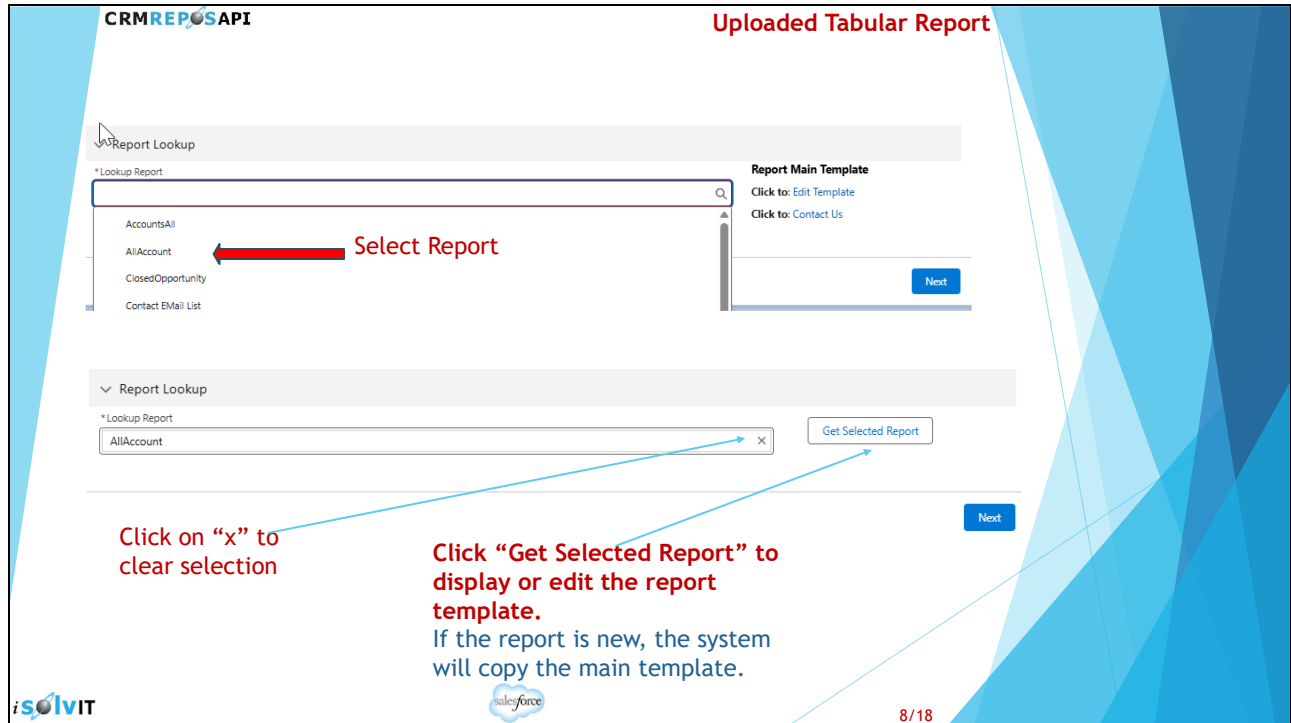


Image 8

Report Selection and Reset Behavior

Once a report is selected from the dropdown list, the dropdown automatically hides and the **Get Selected Report** button becomes visible.

When **Get Selected Report** is clicked, the Flow immediately loads and displays all saved setup information associated with the selected Salesforce report.

An “X” icon then appears on the right side of the **Lookup Report** field. Clicking this icon clears the selected report, removes all displayed setup information, and returns the page to its initial state.

CRMREPORTS API

Uploaded Tabular Report

Section Name	Source of Data	Spreadsheet
Header Left	User Full Name	Auto Filter
Header Middle	Report name	Freeze 1 st Column
Header Right	Org Instance Name	Freeze 1 st Row
Footer Left	User Company + "Confidential Information"	Fit to Print
Footer Middle	Page Number/Total Count	Landscape Print
Footer Right	Report Date	

Object	Value
Process Report	Upload Report
Report Format	Tabular/Formatted
Process Type	Upload Local Report
Slice & Dice	Not Active

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salesforce

9/18

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.

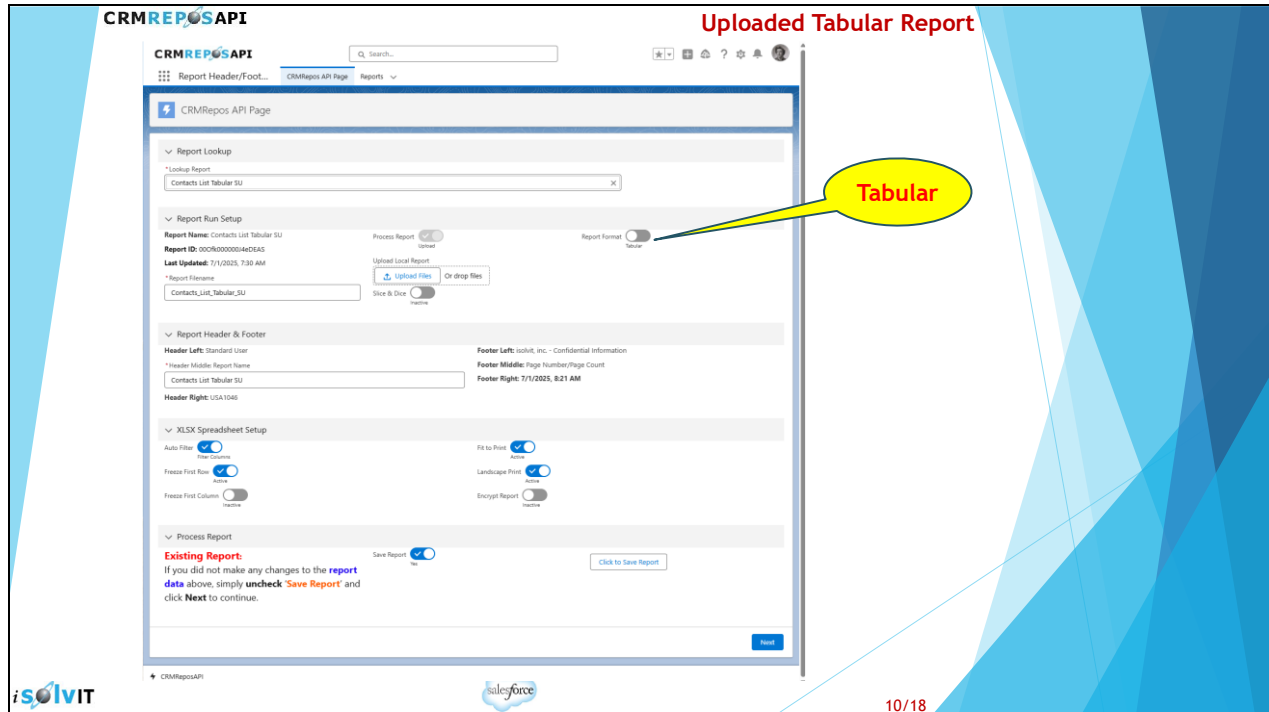


Image 10

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 (.XLS)** 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, you can enable **Optional Encryption Setup**, which encrypts the final XLSX file using a password you provide.

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 with processing the report and generating the final XLSX output.

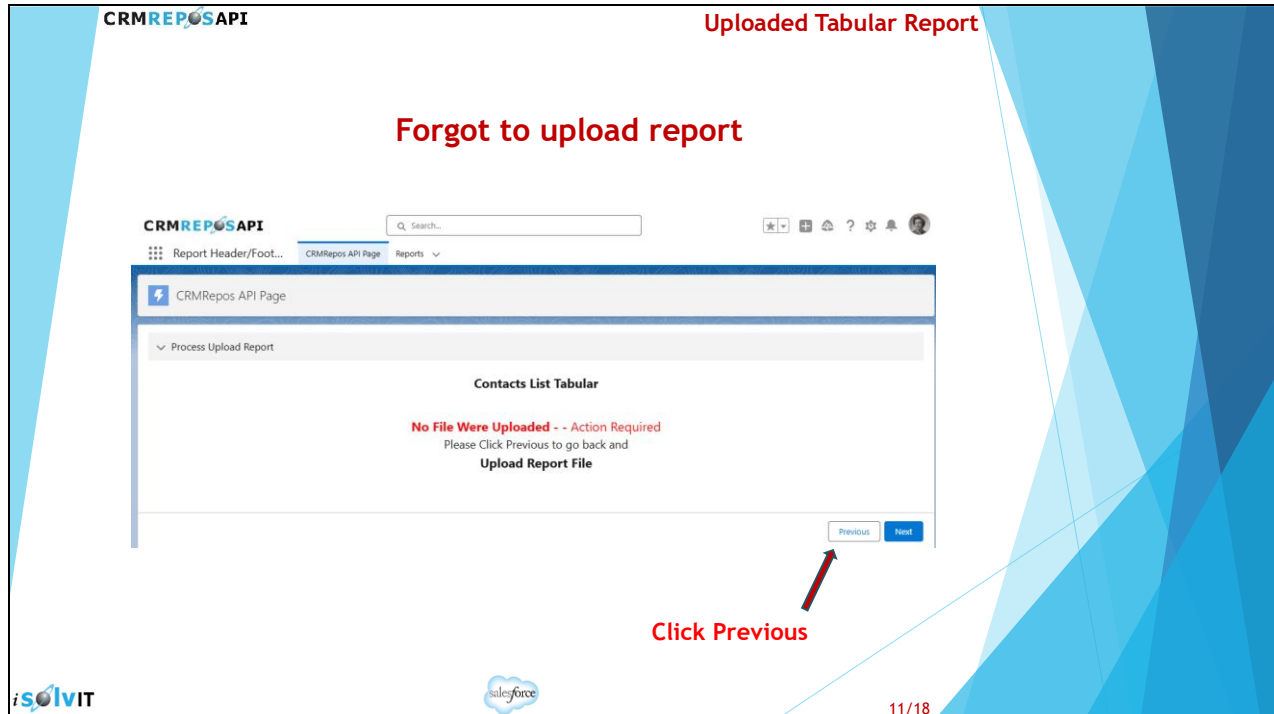


Image 11

Missing Report File Validation

If you attempt to continue without uploading the required report file, CRMReposAPI displays a notification indicating that the file is missing.

In this situation, the system prompts you to click **Previous** to return to the upload step, where you must provide the report file before proceeding with processing.

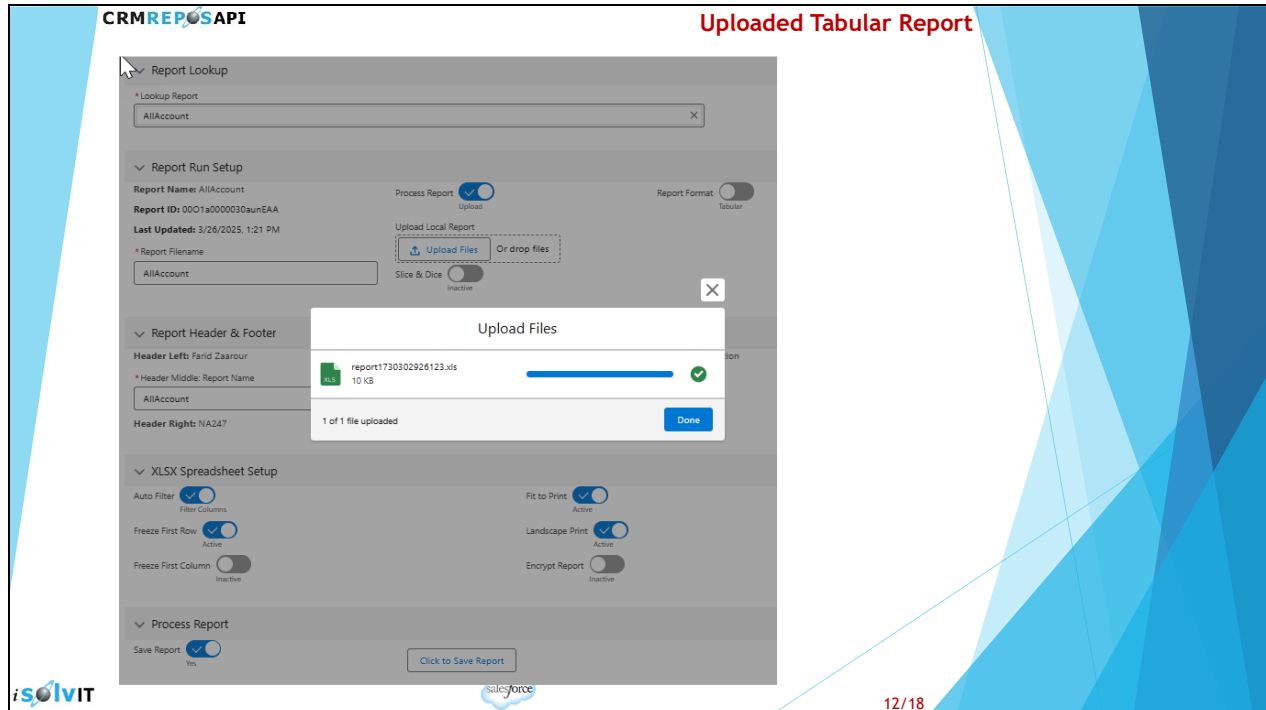


Image 12

Report Upload Confirmation

When a user uploads a report, the system displays a pop-up screen showing the report name along with a loading status bar. This visual indicator confirms that the file is actively being uploaded.

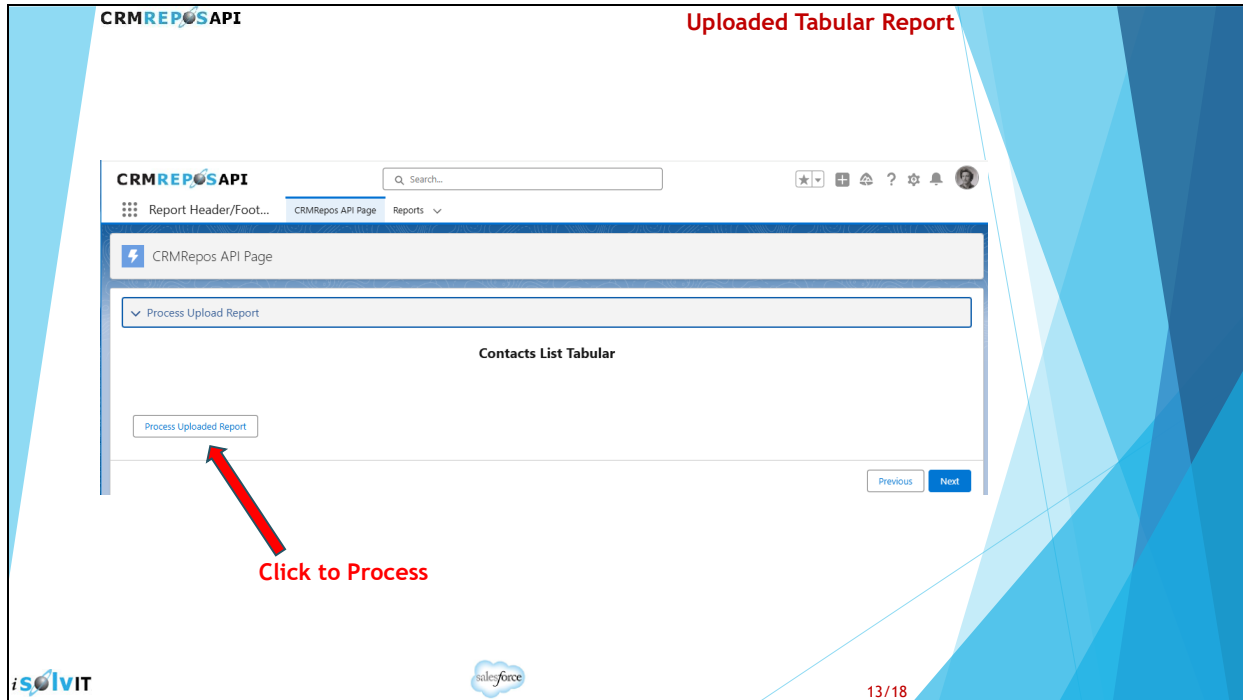


Image 13

Processing the Report

If you proceed without saving your changes, CRMReposAPI will continue using the previously saved configuration. In this case, you must click **Previous** to return to the setup screen and save your updates. Otherwise, the processed report will be generated using the last saved setup.

Once all settings are confirmed, click **Process Uploaded Report** to begin generating the formatted report.

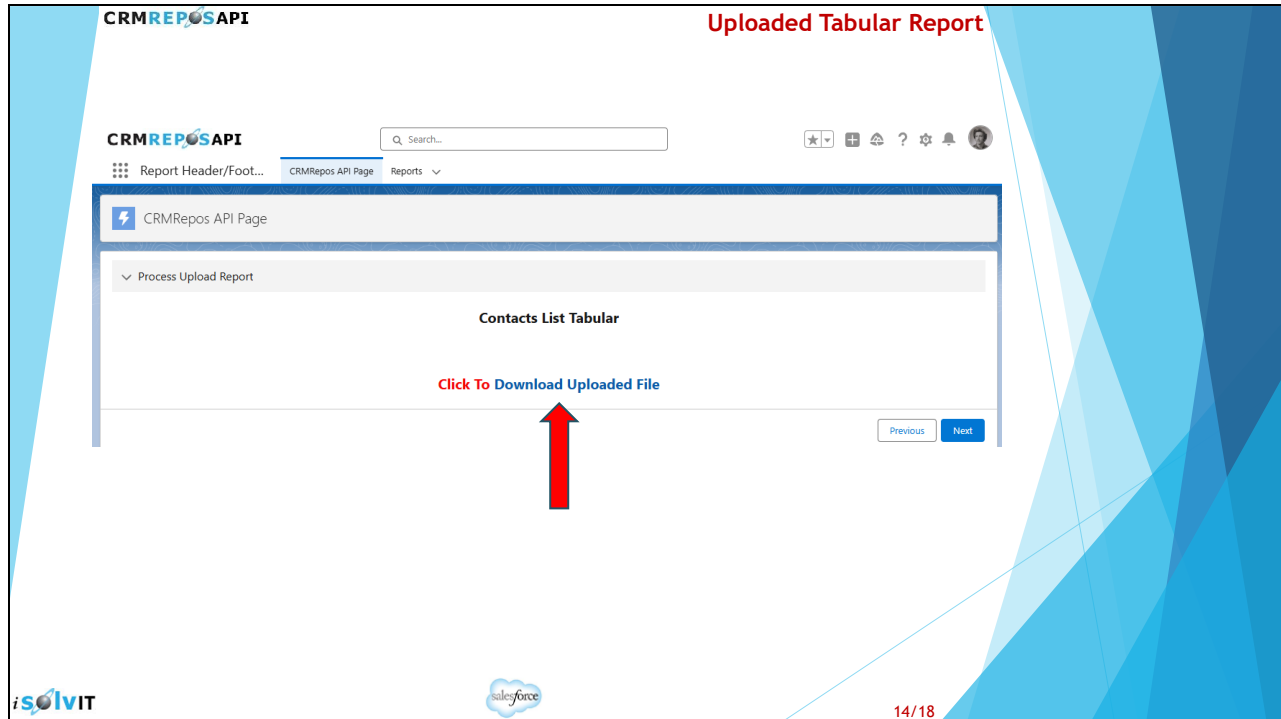


Image 14

Download the Final Report

After processing is complete, download the generated Excel report containing the fully applied headers and footers. The report is delivered in a clean, structured format that preserves all configured layout, formatting, and compliance elements.

The downloaded file is **read-ready and print-ready**, with consistent headers, footers, page numbering, and optimized page layout already applied. No additional formatting, cleanup, or manual adjustments are required before reviewing, sharing, or printing the report.

This ensures a professional, standardized output suitable for internal review, external distribution, and audit or compliance purposes.

CRMREPOSAPI

Uploaded Tabular Report

Processed Report

Contact ID	First Name	Last Name	Account ID	Account Name	Industry	Type	Account I	External I	Email	Phone
00360000013K1L	Gregory	Grimes	0016000003m2Yv	Parker-Bradley	Finance	Customer	ACC001	ACC001	costu	(381)
00360000013K1M	Alexa	Stanton	0016000003m2Yv	Monica-Singleton	Manufacturing	Prospect	ACC002	ACC002	and	666
00360000013K1N	Julie	Cunningham	0016000003m2Yv	Kelly-PLC	Manufacturing	Customer	ACC003	ACC003	djen	728
00360000013K1O	Tyler	Young	0016000003m2Yv	Mueller-Malone	Manufacturing	Partner	ACC004	ACC004	them	mes.com
00360000013K1P	Vivian	Strickland	0016000003m2Yv	Dennis, Buchanan and Martinez	Technology	Customer	ACC005	ACC005	paal	587
00360000013K1Q	Heather	Carlson	0016000003m2Z0	Robinson, Wong and Smith	Retail	Partner	ACC006	ACC006	cath	271
00360000013K1R	Catherine	Boone	0016000003m2Z1	Potter-Brown	Retail	Customer	ACC007	ACC007	melo	+1-
00360000013K1S	Christopher	Rodriguez	0016000003m2Z2	Tate, Walter and Erickson	Manufacturing	Partner	ACC008	ACC008	dead	+1-
00360000013K1T	Jesus	Johnson	0016000003m2Z3	Levy-Cooper	Retail	Partner	ACC009	ACC009	ronn	(22)
00360000013K1U	Margaret	Smith	0016000003m2Z4	Namco PLC	Manufacturing	Prospect	ACC010	ACC010	lnth	477
00360000013K1V	Mary	West	0016000003m2Z5	Logan-Martin	Healthcare	Partner	ACC011	ACC011	sara	com
00360000013K1W	Nathaniel	Williams	0016000003m2Z6	Murphy-Reyes	Finance	Partner	ACC012	ACC012	dean	+1-
00360000013K1X	Kelsey	Franklin	0016000003m2Z7	Rodriguez Ltd	Retail	Customer	ACC013	ACC013	qdan	(3328)
00360000013K1Y	Kevin	Hernandez	0016000003m2Z8	Knight LLC	Retail	Partner	ACC014	ACC014	chap	33586
00360000013K1Z	Tracy	Ruzz	0016000003m2Z9	Boyd, Dickson and Perez	Manufacturing	Partner	ACC015	ACC015	jason	956
00360000013L1A	Erik	Reed	0016000003m2ZA	Peters, Hayes and Cruz	Healthcare	Prospect	ACC016	ACC016	bake	966
00360000013L1B	John	Baker	0016000003m2ZB	Watson Inc	Retail	Prospect	ACC017	ACC017	waku	008
00360000013L1C	Debra	Smith	0016000003m2ZC	Gonzalez-Lee	Finance	Prospect	ACC018	ACC018	holly	(306)
00360000013L1D	Michelle	Alvarez	0016000003m2ZD	Sims Ltd	Retail	Prospect	ACC019	ACC019	ghar	001
00360000013L1E	Jeffrey	Green	0016000003m2ZE	McIntyre-Henderson	Healthcare	Prospect	ACC020	ACC020	david	+1-
00360000013L1F	Kevin	Edms	0016000003m2ZF	Johnson, Scott and Morgan	Finance	Customer	ACC021	ACC021	arch	521
00360000013L1G	Jill	Parsons	0016000003m2ZG	Frank, Gomez and Andrews	Technology	Customer	ACC022	ACC022	jason	2160
00360000013L1H	Christina	Ellison	0016000003m2ZH	Patrick Group	Healthcare	Customer	ACC023	ACC023	jenn	7538
00360000013L1I	Paul	Hernandez	0016000003m2ZI	Cooper Group	Finance	Customer	ACC024	ACC024	jaac	om
00360000013L1J	Natalie	Dillon	0016000003m2ZJ	Smith, Reynolds and Carlson	Technology	Partner	ACC025	ACC025	ywic	+1-
00360000013L1K	Heather	Avellano	0016000003m2ZK	Ellis, Odum and Holloway	Manufacturing	Customer	ACC026	ACC026	cond	(334)
00360000013L1L	Philip	Garcia	0016000003m2ZL	Franklin Ltd	Finance	Partner	ACC027	ACC027	mewa	(806)
00360000013L1M	Kelly	Schultz	0016000003m2ZM	French-Garcia	Manufacturing	Partner	ACC028	ACC028	willie	588
00360000013L1N	Kevin	Smith	0016000003m2ZN	Powell, Chen and Wagner	Healthcare	Customer	ACC029	ACC029	clm	073
00360000013L1O	Tammy	Diaz	0016000003m2ZO	Martinez, Davis and Anderson	Manufacturing	Partner	ACC030	ACC030	alzar	74C
00360000013L1P	Brenna	Gutierrez	0016000003m2ZP	Jackson Inc	Finance	Partner	ACC031	ACC031	patel	(451)
00360000013L1Q	Anthony	Valencia	0016000003m2ZQ	James Group	Technology	Prospect	ACC032	ACC032	maad	336
00360000013L1R	John	Cole	0016000003m2ZR	Higgins-Shelton	Finance	Customer	ACC033	ACC033	barn	+1-
00360000013L1S	Haley	Smith	0016000003m2ZS	Hall, Jones and Williams	Finance	Partner	ACC034	ACC034	matt	24148

15/18

Image 15

Processed Report Output

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

To view exactly how the report will print, open **File > Print Preview** to review the final formatting and page layout.

CRMREPOSAPI

Uploaded Tabular Report

Contact List Tabular

Header

Fit to Print

Footer

1 of 2

16/18

Image 16

Print Preview

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.

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)

CRMREPOSAPI

Run Tabular Report

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. 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.

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
- 2. Download the Processed File**
 - Once processing is complete, click **Click To Download Run File** to download the processed report.

iSOLVIT **salesforce** **17/18**

Image 17

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.

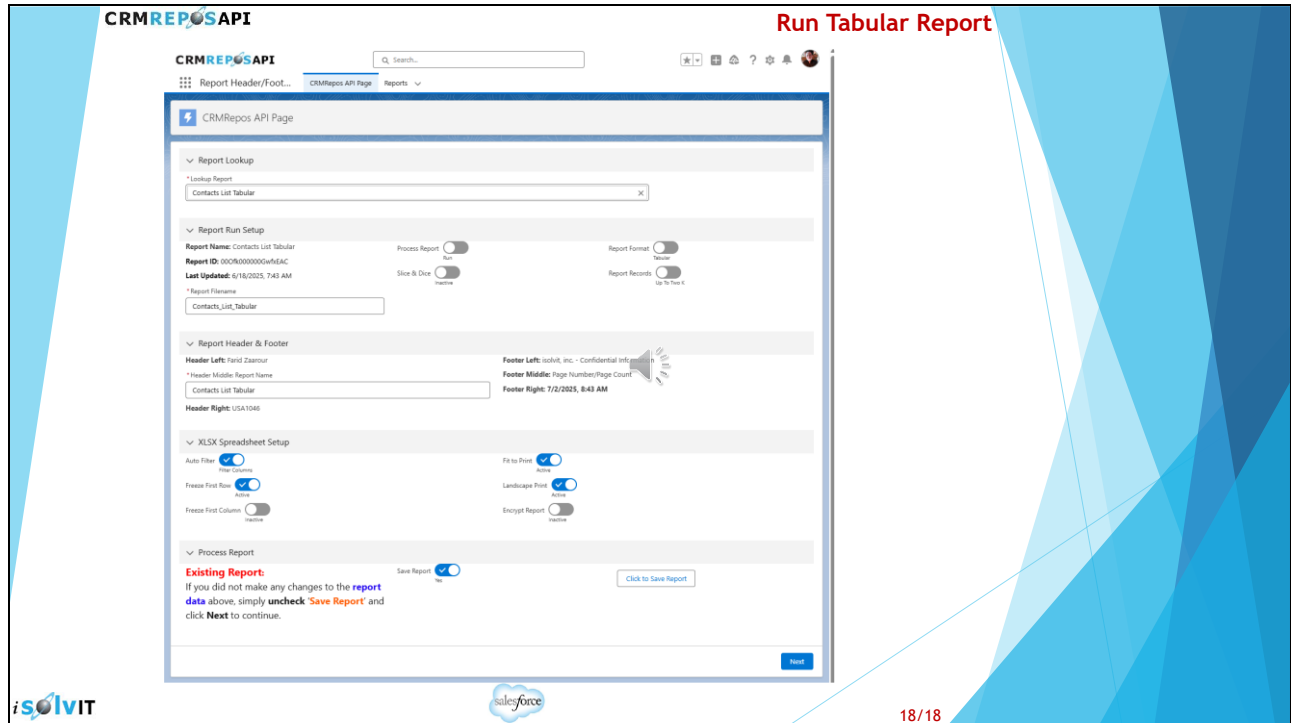


Image 18

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.