

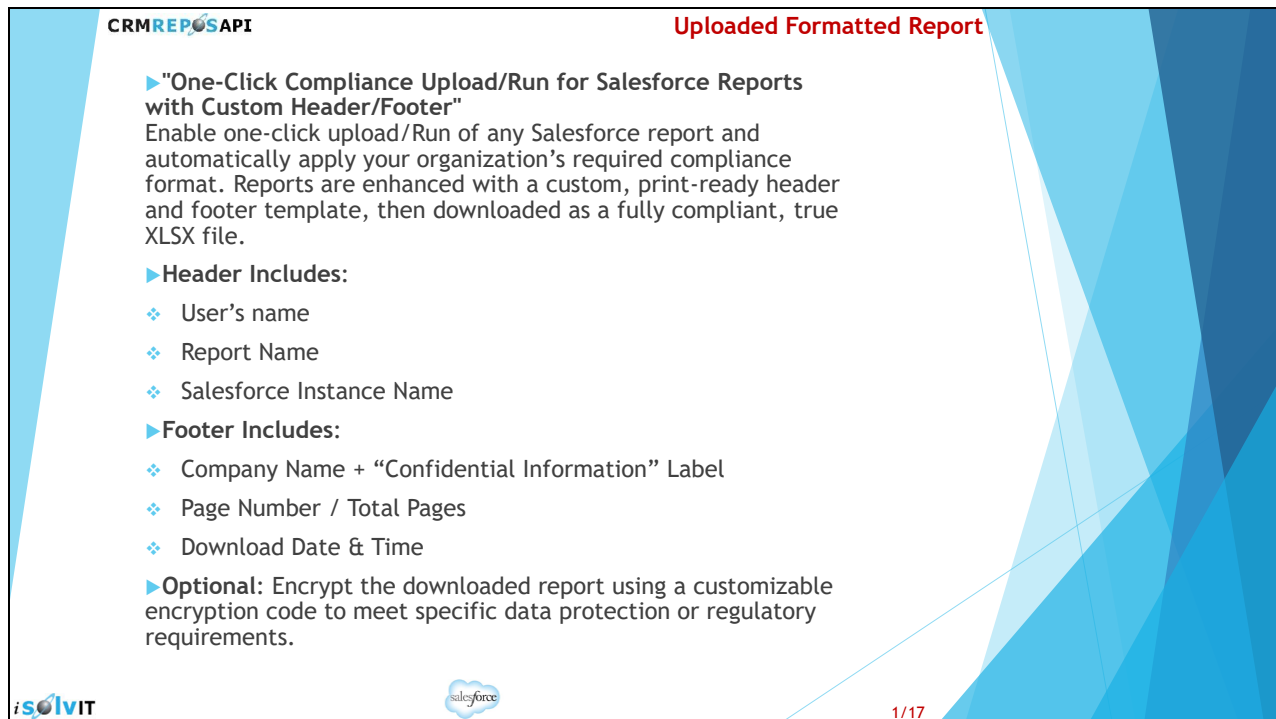


Image 1

CRMReposAPI enables organizations to enhance **Salesforce Formatted Reports** by converting them into professionally structured, print-ready Excel files—while preserving the report’s original layout, grouping, and totals.

The Formatted Report workflow is designed for reports that require **visual structure and analytical context**, such as grouped data, subtotals, grand totals, and filters. CRMReposAPI augments these reports with standardized headers and footers and applies Excel-specific optimizations that make the output suitable for distribution, review, and printing—without altering the report’s analytical intent.

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

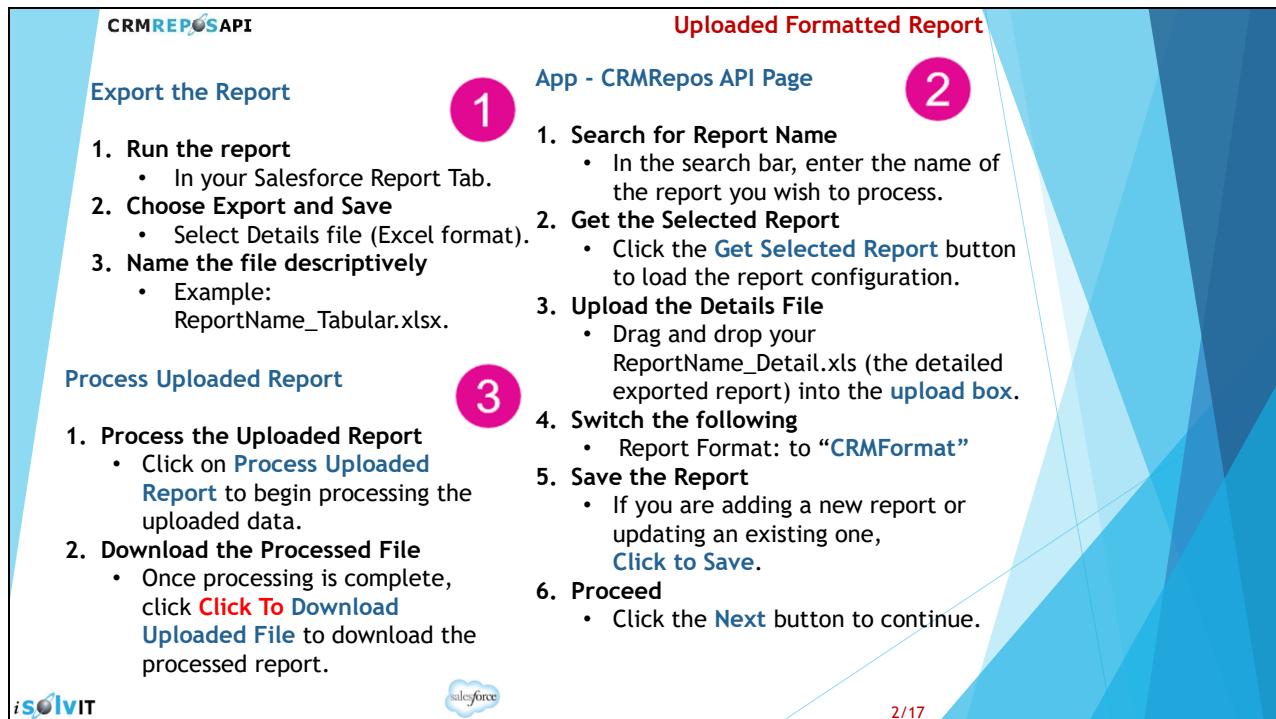


Image 2

Processing a Formatted Salesforce Report with CRMReposAPI

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

Step 1: Export the Report from Salesforce

Begin in Salesforce by running the desired report. Export the report in **Excel (Formatted)** 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 **CRMFormat** to ensure CRMReposAPI applies the predefined headers, footers, and 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 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 fully formatted, print-ready, and compliant—without any manual cleanup.

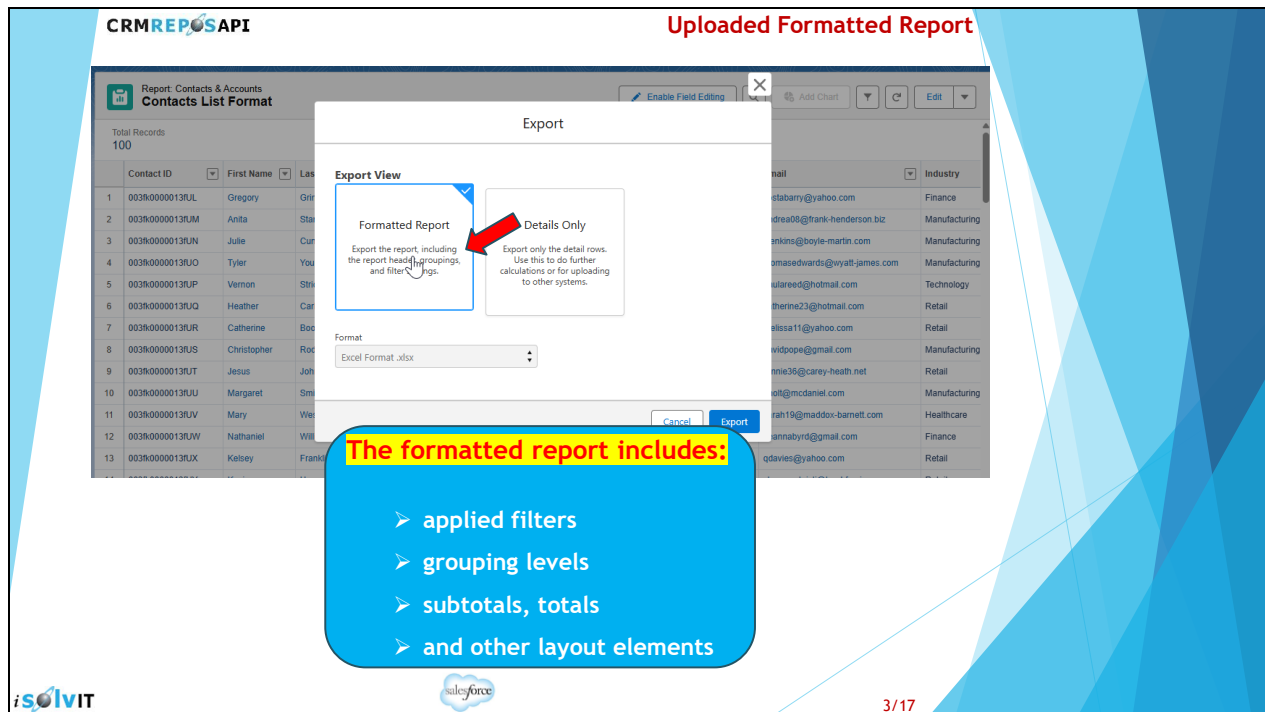


Image 3

Exporting a Formatted Report from Salesforce

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

Choosing **Formatted Report** ensures that Salesforce preserves the report's layout structure, including grouping, column order, and formatting, in the generated Excel file. This format is required for CRMReposAPI to correctly recognize the report structure and apply headers, footers, print optimization, and other configured enhancements during processing.

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

CRMREPOSAPI

Uploaded Formatted Report

Contacts List Format

As of 2025-07-03 12:03:13 Pacific Standard Time/PST • 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	Phone	Email	Industry	Type
003f60000013fUL	Gregory	Grimes	001f6000003mVv	Parker-Bradley	(38)	cost	Finance	Customer
003f60000013fUM	Anita	Stanton	001f6000003mVv	Montes-Singleton	606	and	biz	Manufacturing Prospect
003f60000013fUN	Julie	Cunningham	001f6000003mVv	Kelly PLC	728	den		Manufacturing Customer
003f60000013fUO	Tyler	Young	001f6000003mVv	Mueller-Malone	+1-	80 thon	es.com	Manufacturing Partner
003f60000013fUP	Vernon	Strickland	001f6000003mVv	Dennis, Buchanan and Martinez	587	paul		Technology Customer
003f60000013fUQ	Heather	Carlson	001f6000003mZ0	Robinson, Wong and Smith	271	6 cath		Retail Partner
003f60000013fUR	Catherine	Boone	001f6000003mZ1	Porter-Brown	+1-	11 mell		Retail Customer
003f60000013fUS	Christopher	Rodriguez	001f6000003mZ2	Tate, Walter and Erickson	+1-	8872 davi		Manufacturing Partner
003f60000013fUT	Jesus	Johnson	001f6000003mZ3	Levy-Cooper	(22)	5 ronm		Retail Partner
003f60000013fUJ	Margaret	Smith	001f6000003mZ4	Navarro PLC	477	hhol		Manufacturing Prospect
003f60000013fUV	Mary	West	001f6000003mZ5	Lagan-Martin	+1-	1362 sara	om	Healthcare Partner
003f60000013fUW	Nathaniel	Williams	001f6000003mZ6	Murphy-Reyes	640	dear		Finance Customer
003f60000013fUX	Kelsey	Franklin	001f6000003mZ7	Rodriguez Ltd	534	qdad		Retail Customer
003f60000013fUY	Kevin	Hernandez	001f6000003mZ8	Knight LLC	955	79 chap	.com	Retail Partner
003f60000013fUZ	Tracy	Rule	001f6000003mZ9	Boyd, Dickson and Perez	956	7 jaso		Manufacturing Partner
003f60000013fUa	Erik	Reed	001f6000003mZA	Peters, Hayes and Cruz	008	bake		Healthcare Prospect
003f60000013fUb	John	Baker	001f6000003mZB	Watson Inc	(30)	wsil		Retail Prospect
003f60000013fUc	Debra	Smith	001f6000003mZC	Gonzalez-Lee	001	8404 holh		Finance Prospect
003f60000013fUd	Michelle	Alvarez	001f6000003mZE	Sims Ltd	+1-	1306 gtho		Retail Prospect
003f60000013fUe	Jeffery	Green	001f6000003mZF	McIntyre-Henderson	521	davi		Healthcare Prospect
003f60000013fUf	Kevin	Evans	001f6000003mZF	Johnson, Scott and Moran	618	asch	.biz	Finance Customer

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Image 4

Formatted Report Details on the First Page

The first page of the formatted report displays key contextual information, including the **report name**, **export date**, **user name**, and applied report filters.

This provides a complete and accurate summary of the report's configuration and execution context.

CRMREPOS API

Uploaded Formatted Report

Contacts List Format
As of 2025-07-03 12:03:13 Pacific Standard Time/PST • 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	001fk0000003mzv	Parker-Bradley
003fk0000013FUM	Anita	Stanton	001fk0000003mzv	Montes-Singleton
003fk0000013FUN	Julie	Cunningham	001fk0000003mzv	Kelly PLC
003fk0000013FUJ	Tyler	Young	001fk0000003mzv	Mueller-Malone
003fk0000013FUP	Vernon	Strickland	001fk0000003mzv	Dennis, Buchanan and Martinez
003fk0000013FUQ	Heather	Carlson	001fk0000003mzv	Robinson, Wong and Smith
003fk0000013FUR	Catherine	Boone	001fk0000003mzv	Porter-Brown
003fk0000013FUS	Christopher	Rodriguez	001fk0000003mzv	Tate, Walter and Erickson
003fk0000013FUT	Jesus	Johnson	001fk0000003mzv	Levy-Cooper
003fk0000013FUU	Margaret	Smith	001fk0000003mzv	Navarro PLC
003fk0000013FUV	Mary	West	001fk0000003mzv	Logan-Martin
003fk0000013FUW	Nathaniel	Williams	001fk0000003mzv	Murphy-Reyes
003fk0000013FUX	Kelsey	Franklin	001fk0000003mzv	Rodriguez Ltd
003fk0000013FUY	Kevin	Hernandez	001fk0000003mzv	Knight LLC
003fk0000013FUZ	Tracy	Ruiz	001fk0000003mzv	Boyd, Dickson and Perez
003fk0000013FUa	Erik	Reed	001fk0000003mzv	Peters, Hayes and Cruz
003fk0000013FUb	John	Baker	001fk0000003mzv	Watson Inc
003fk0000013FUc	Debra	Smith	001fk0000003mzv	Gonzalez-Lee
003fk0000013FUd	Michelle	Alvarez	001fk0000003mzv	Sims Ltd
003fk0000013FUe	Jeffery	Green	001fk0000003mzv	McIntyre-Henderson

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Image 5

Print Preview Behavior in Salesforce Formatted Exports

When **Print Preview** is selected, the exported Salesforce formatted report does not include any headers or footers and print layout adjustments such as **Fit to Print** are not applied.

As a result, report columns may expand across multiple pages, and these layout elements will not appear in the print preview. This behavior reflects Salesforce's native formatted XLSX export limitations.

CRMREPOSAPI

Uploaded Formatted Report

Phone	Email	Industry	Type
(381) 011 6463-7310	costaharv@vahn.no	Finance	Customer
606	andre	derson.biz	Manufacturing
728	djenk	in.com	Manufacturing
+1-	30 thom	att-james.com	Manufacturing
587	paula	om	Technology
271	5 cathe	l.com	Retail
+1-	11 melis	m	Retail
+1-	3872 david	m	Manufacturing
122	5 ronni	th.net	Retail
477	hholt		Manufacturing
+1-	1362 sarah	rnett.com	Healthcare
846	deani	om	Finance
334	qdavi		Retail
955	9 chapr	frazier.com	Retail
956	7 jason		Manufacturing
006	baker	il.com	Healthcare
[30	wsilvc		Retail
007	3404 hollyc		Finance
+1-	1306 gthon	om	Retail
521	david		Healthcare

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Image 6

Salesforce Report Export Behavior

Salesforce exports report exactly as they are displayed on screen. When **Print Preview** is used, not all columns appear within a single view. Wide reports are automatically split into multiple horizontal sections, requiring users to scroll across pages to view all fields.

This behavior creates challenges when printing or sharing reports, as the full dataset cannot be reviewed or presented in a single, continuous layout.

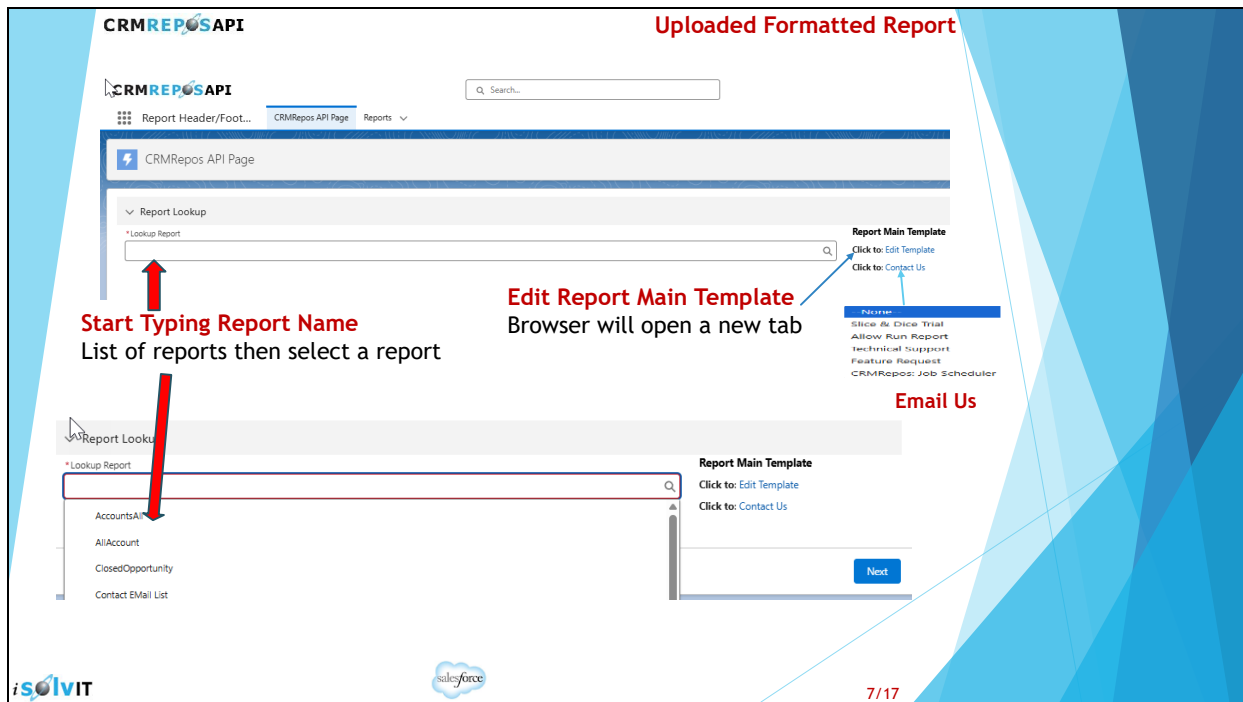


Image 7

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.

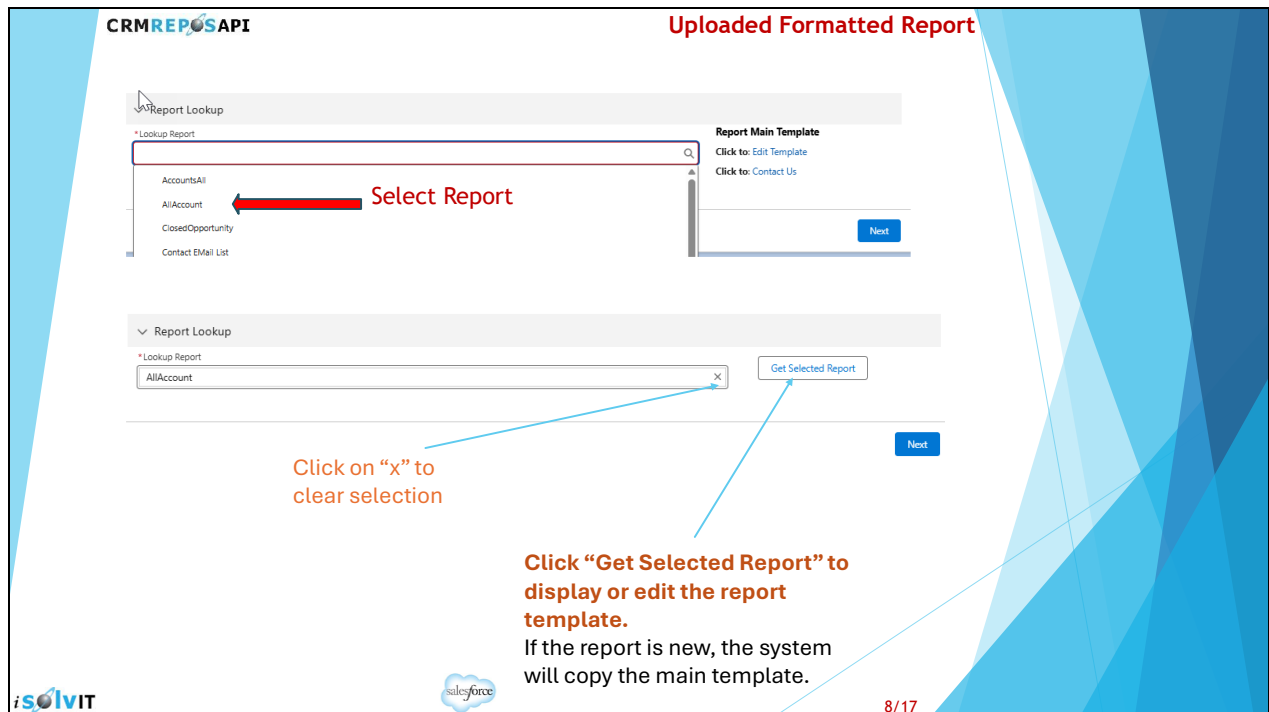


Image 8

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.

CRMREPOSAPI Uploaded Formatted Report

Section Name	Source of Data
Header Left	User Full Name
Header Middle	Report name
Header Right	Org Instance Name
Footer Left	User Company + "Confidential Information"
Footer Middle	Page Number/Total Count
Footer Right	Report Date

Object	Value
Process Report	Upload Report
Report Format	Formatted
Process Type	Upload Local Report

Spreadsheet
 Fit to Print
 Landscape Print

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Image 9

Report Configuration Overview

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

Header and Footer Element Definitions

The following header and footer elements are system-defined and populated from trusted sources 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 altered dynamically per run, ensuring standardized and audit-ready output.

Spreadsheet Formatting Options

CRMReposAPI automatically applies the following spreadsheet formatting settings:

- 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:** Formatted
- **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 and easy-to-understand overview of how CRMReposAPI structures, formats, and prepares the report before generating the final Excel file.

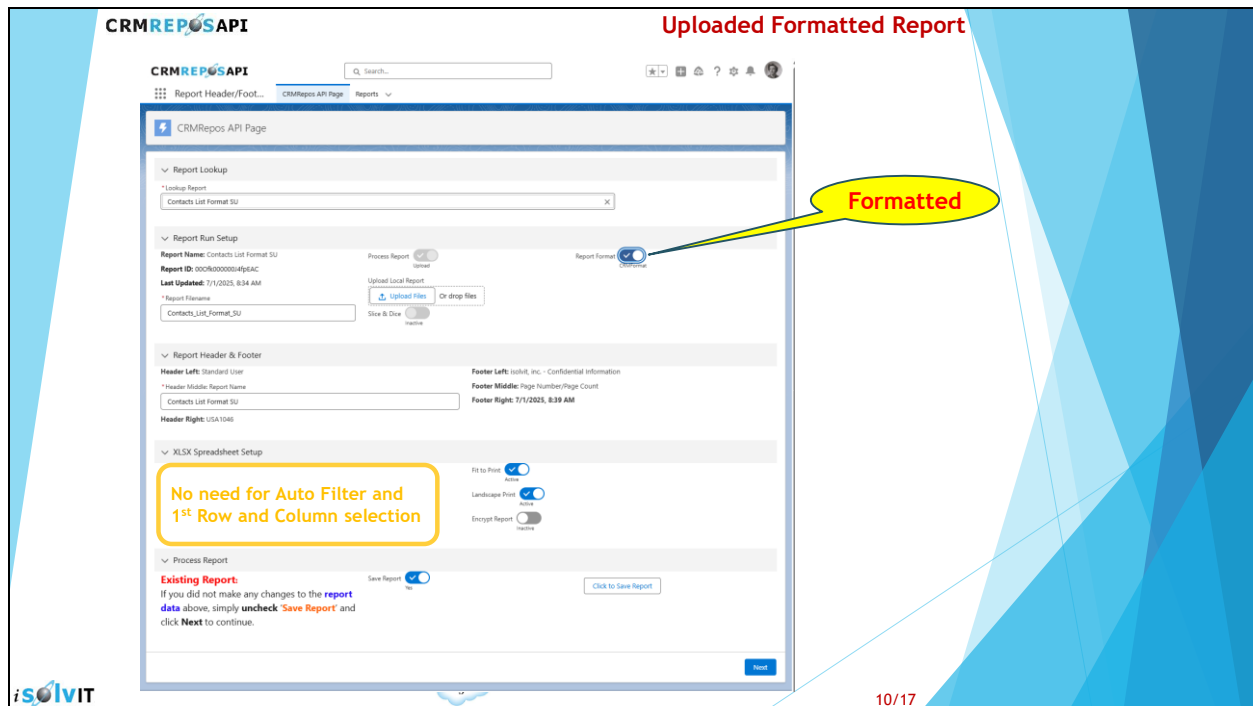


Image 10

CRMReposAPI Report Processing Page Overview

This page guides you through every step required to prepare, configure, and process an uploaded Salesforce report using CRMReposAPI. The screen is organized into five distinct sections, each responsible for a specific part of the setup and processing workflow.

1. Report Lookup

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

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

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 here, you can:

- Edit the downloadable report filename
- Set the **Report Format** to **CRMFormat**
- Drag and drop the exported Salesforce **Formatted 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 instance name
- Export date
- Company name
- Page numbering

The only editable field in this section is the **Report Name**, which you may modify 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.

Available options include:

- **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.

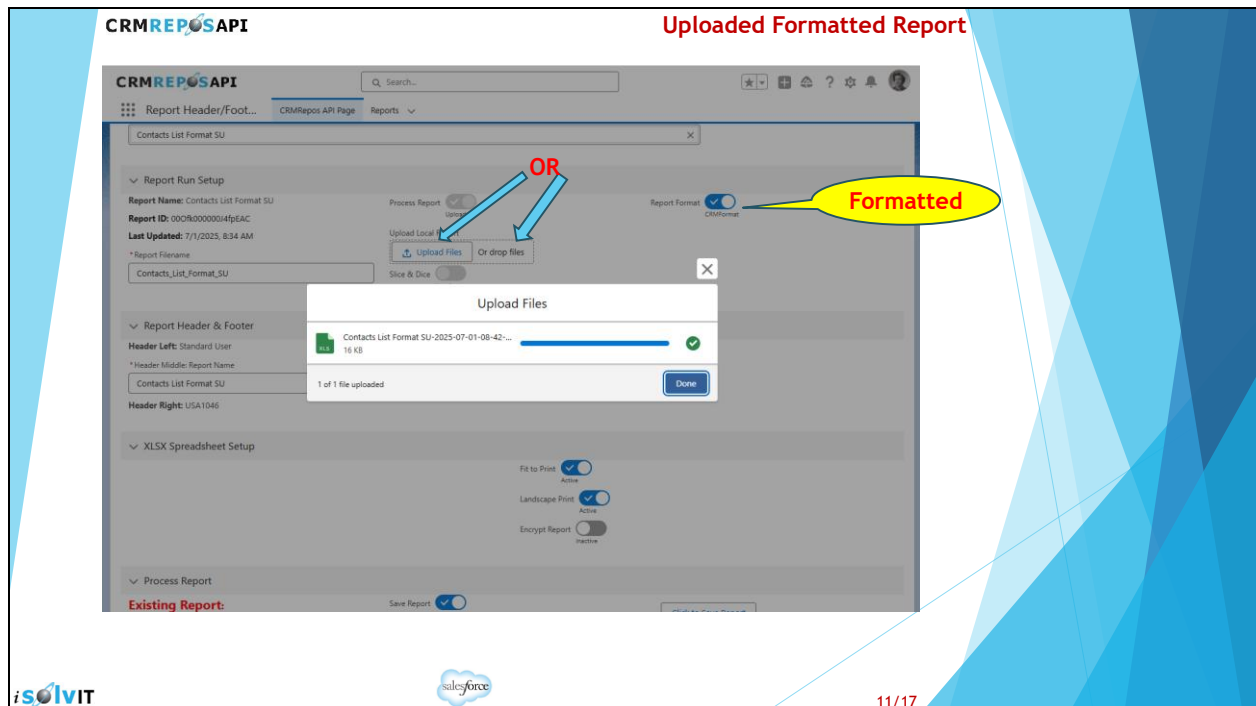


Image 11

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.

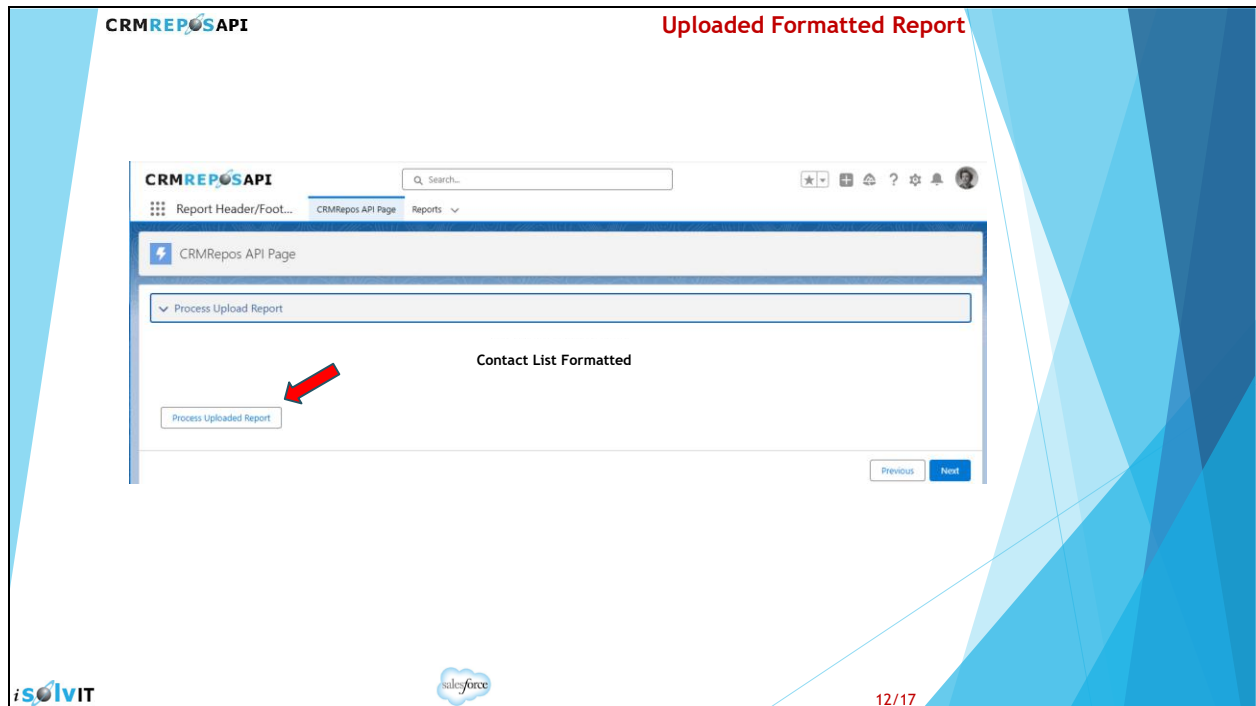


Image 12

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.

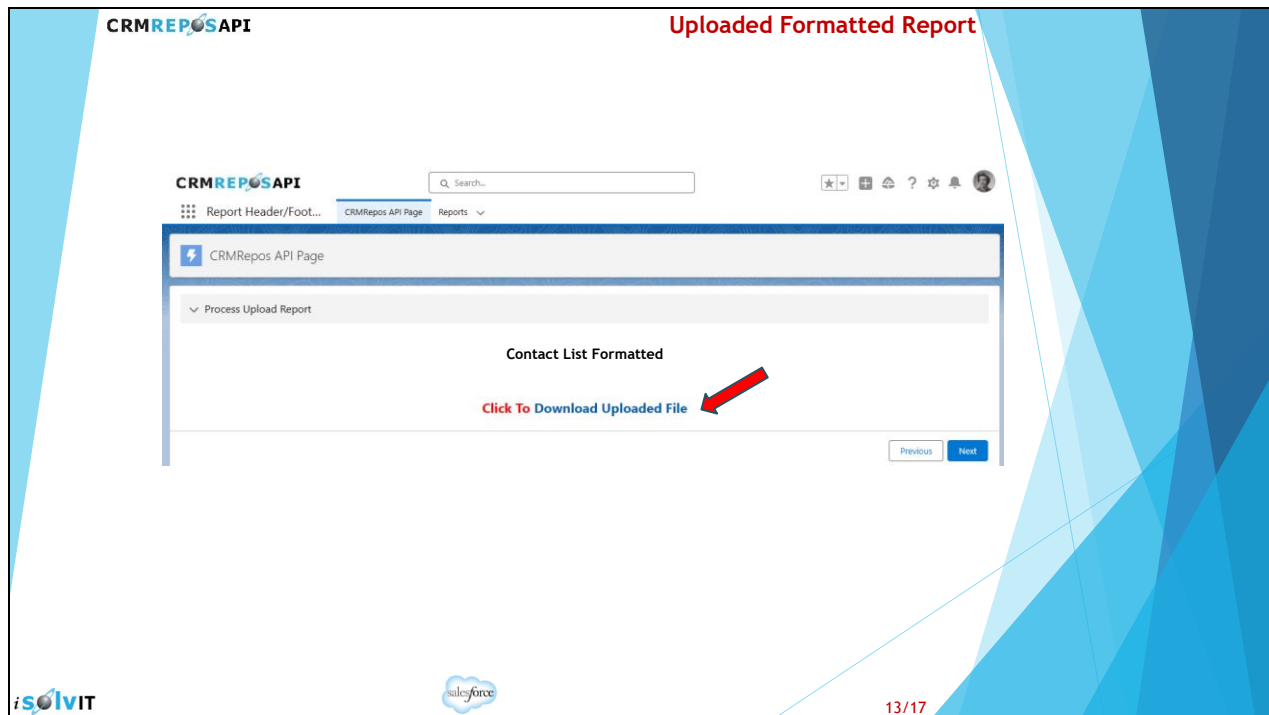


Image 13

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.

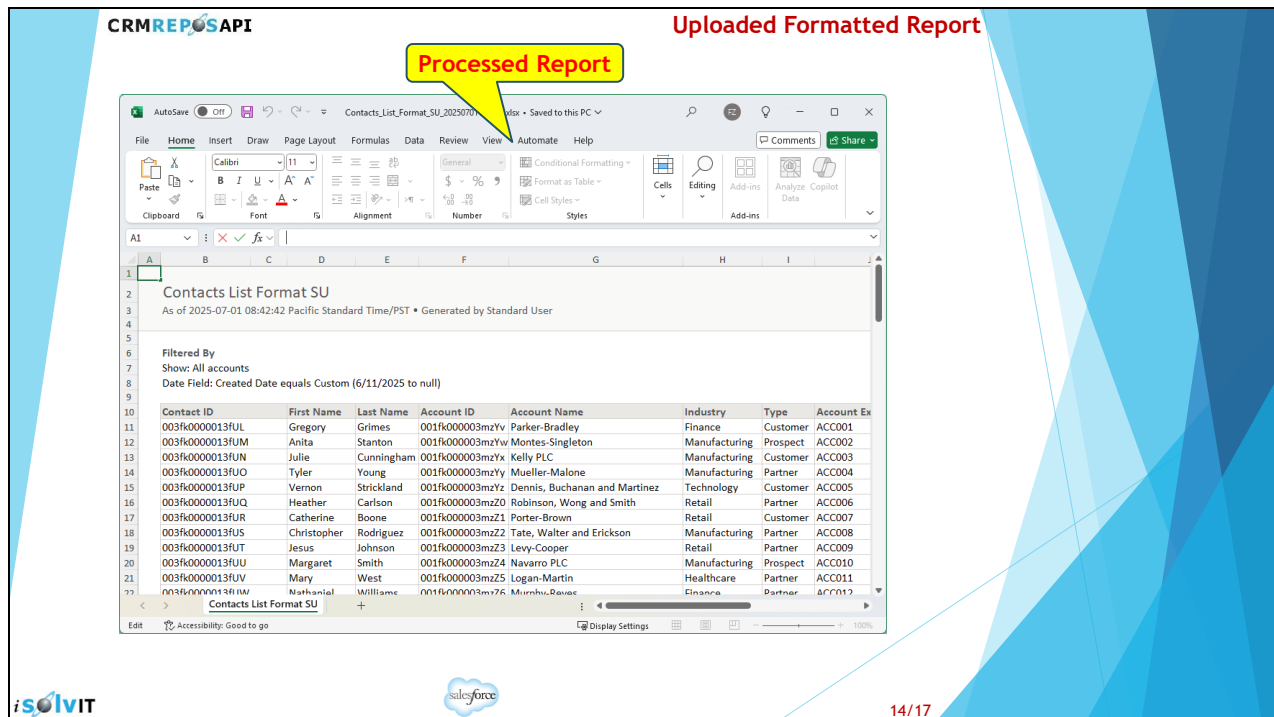


Image 14

Processed Report Output

This is the processed report generated through CRMReposAPI. The output includes full spreadsheet formatting, 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.

Image 15

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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

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 Format: **"Formatted"**
- 1 **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 Formatted Report

Run Function Require CRMRepos Subscription Which Requires:

- Master Login
- Security Permission
- External Client Setup

Trusted IP: 20.119.16.11

Process Run Report

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

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Image 16

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.

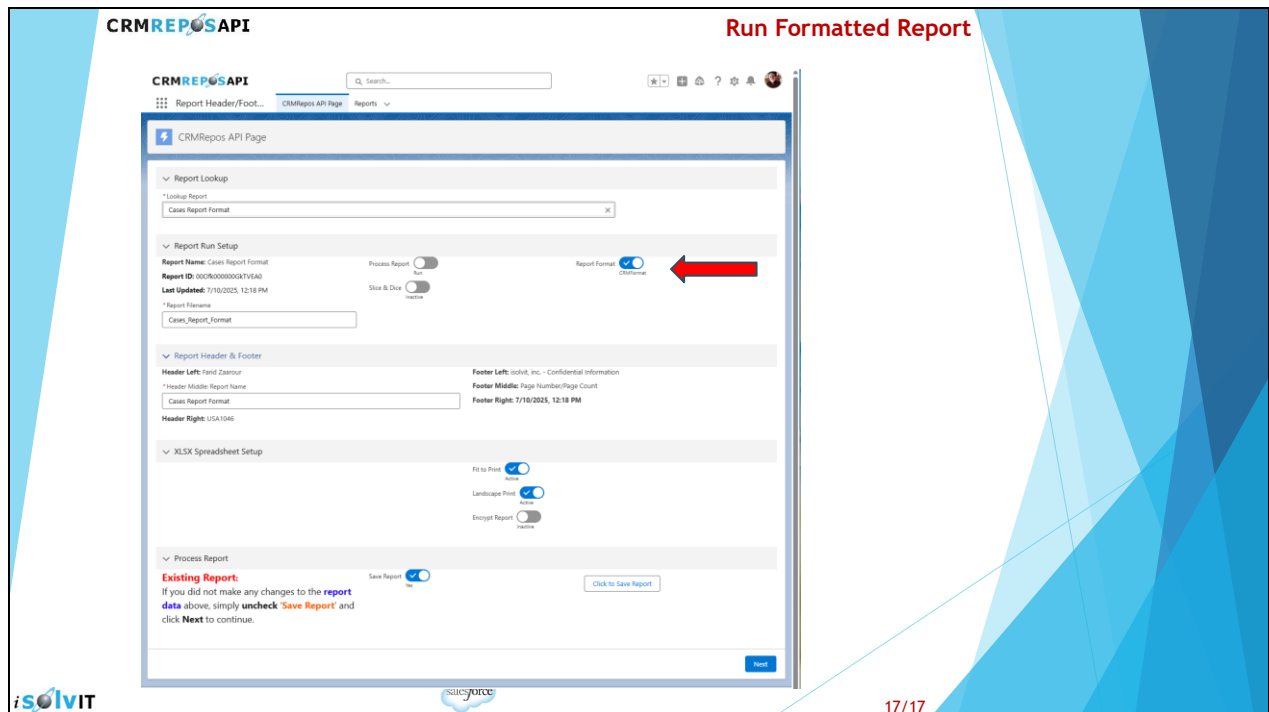


Image 17

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.