Starter Kit: Query and Report Examples

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Queries

Registrants complete a specific material

- Waiver complete or incomplete (sometimes waivers are required for certain countries)

- Passport copy -> verify photo upload

- Payment ->mark material as received

- Budget/Reimbursement

Registrants with one or more of the following:

- Of a certain age
  - Applicant Admin > Applicant Parameters > DOB greater than 12/31/1995.
- With some sort of medical history
  - Applicant Admin > Application Parameters/Questionnaire
- From or going to a specific country
  - FROM: Applicant Admin > Advanced Search > Applicant Parameters > Country of Origin (pick list)
  - GOING: Applicant Admin > Advanced Search > Application Parameters > City, Country,Region

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Registrants with complete registrations

- Applicant Admin > Advanced Search > Application Parameters > Application Completed since (today).

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Registrants whose passport will expire in 6 months

- Applicant Admin > Advanced Search > Application Parameters > Questionnaires [Passport Information]
- QW IN Records

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Registrants Abroad Right Now

- Registrant Admin > Locator Search

Abroad Address Notification

- Applicant Admin > Locator Search > Currently Abroad [Today]
- QW IN Records
- Update Profile or Answer Questionnaire

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Reports

Emergency contacts

Passport and DOB

Approved Travel to Restricted Location

Application Itinerary Stock Report

Advanced Topics

- RSS Feed
- Vlookup
- If Statements
- Conditional Formatting

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Applicants traveling to DOS Travel Warning Location

1. Saved Query : Current Travelers
2. Run Application Itinerary Stock Report on Saved Query
3. Copy/Paste Application Itinerary Stock Report into "Cool Report"
4. Auto Fill

5. Compare "Cool Report" to Saved Query
6. Add Application Tag value

- Query for Query Watch: Applicant Admin > Advanced Search > Application Parameters > Travel Warning/Alert Application Tag

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KB Articles

- https://tdsupport.force.com/support/articles/General/How-to-run-save-and-share-queries-and-reports

- https://tdsupport.force.com/support/articles/General/Query-Watch

- https://tdsupport.force.com/support/articles/General/Using-Excel-and-MS-Word-to-Automate-Office-Workflow

- https://tdsupport.force.com/support/articles/General/Stock-Report-for-Itineraries

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Questions

- Please don't forget to fill out the session evaluation form
  - Session Title: Start Kit: Query and Report Examples
  - Presenter: Chelsey Harwood