Last Modified on 01/13/2025 4:28 pm EST

## **Right Click Drilldown**

General Tab > Right Click Drilldown

Primary this feature is used for drilldowns to links within SGA Sales. For additional applications please contact the SGA support team.

Find the sales URL that you would like to use as a drill down. See screenshot below.

$\leftarrow \   \rightarrow $	→ C 🔒 staffymcavbr.sgasoftware.com/Sales/MemberActivity?ActivityCode=400-003-2020-10-40708-01&Mode=1											
Apps	🗱 Apps 🔄 SA 📙 Dev and Master Sites 📕 Sales Clients 📕 ESXI 🚺 Personal											
the	the y MCA of Virginia's Blue Ridge											
Home	Check In	Room Check In	Find Member	Offerings	End of Shift	Other	Reporting	Schedules	Settings			
Activi	ties for Y	outh Cardio O	rientation (	Sep 10) (								
Activity Code:         Timeframe:         Dates:         Activity Status:         Member Status:         3rd Party:           4/00-003-2020-10-40708-01         Last 30 Days         V         08/18/2019         Im         to         12/31/9999         All         V         Activity T         P												
Product Type:     Product ID:     Unit ID:       (All)     ▼     □     □     □     □     □     □     □												
Details   C	Details   Cancel   Change Dates   Transactions   G/L Transactions   Invoice   Payment Plan   Recurring Billing   Misc Info   Roster   Attachments   Wait List											

On the General tab of the report that you wish to add the url drill down, select the "Right Click Drilldown" button.

Reports > S	GA Master	Sales Reports > Programs > Rosters							
Report:	Basic Ros	ter 🔻 🖬 🗙							
Select	General	Rows Columns							
Connection:		Sales Reports							
		Provider=SQLOLEDB; Server=YMCARoanoke\SQL2016,41001; Database=YMCARoanoke; Uid=SGA							
Query Path:		ISGA Master Sales Reports/Programs/Rosters/_Queries							
Query:		Roster v 🛅 🖬 🗙							
		If you save to excel, it will show the full report as shown in the generic report writer.							
Font:		Microsoft Sans Serif							
Nbr of frozen	columns:	0							
Access level	to modify	20 - Maintain your own views 🔹							
		Exclude rows with zeros in all columns							
		Summarize Rows Interview Always show select screen before displaying report							
		Auto size rows Apply Account Rectaiclines Print Properties Report Variables Report Variables Columns From Data Source Columns From Data Source							
		✓ Specify Where Clause:							

Add a new drilldown and then select Drilldown URL Properties

Right Click Drilldowns 👔											
	•	×	<b>*</b>	ŵ		🖋 Insert Variable	Prilldown URL Properties	Nequired Columns			
q		Name			~	Drilldown Url		~	Required		
Ĭ											

This will open up an editing window for the url link. This is where you want to paste the link for the sales page that you want to navigate to in the report.

it C Drilldov	n URL Properties 🌗	×
lam URL : 1em	Insert Variable Construct Drilldown to Report Url https://staffymcavbr.sgasoftware.com/Sales/MemberDetails?MemberID=61184&FamilyID=0	

You will need to identify the values in the URL that make it unique and change them to variables. In the link below the values that need changed are the member id and family id.

https://staffymcavbr.sgasoftware.com/Sales/MemberDetails?MemberID=61184&FamilyID=0

These values will need to be replaced with a variable from the report query. The easiest way to do that is to remove the value 61184. Make sure your cursor is after the equal sign following MemberID=. Then click on the Insert Variable button.

nt C	Drilldown URL Properties 🕧
	Insert Variable Construct Drilldown to Report Url
lan	URL : https://staffymcavbr.sgasoftware.com/Sales/ <mark>WenberDetails</mark> ?MemberID=&FamilyID=0

The Insert variable button will open up a window that shows all of the available variables. I always recommend using the Query Column Variables. If the variable that you need is not available as query variable, please email SGA or your reporting admin so that it can be added to the query. Select the variable that is needed for the URL. This should add it to your link.

Report Writer	t.
t C Drilldow	vn URL Properties 🕧
2	Insert Variable Construct Drilldown to Report Uri
am URL : Ien	https://staffymcavbr.sgasoffware.com/Sales/ <u>MemberDetails?MemberID</u> =@QueryColumn.MemberID@&EamilyID=0

Repeat the same process for any remaining variables. In this case, it is the Family ID.

## This is the completed URL:

Di	rilldown	n URL Pro	operties 👔		
2	URL :			Insert Variable	Construct Drilldown to Report Url
T	https://s Membe	staffymcay erID=@Qu	br.sgasoftware.cc eryColumn.Memb	om/Sales/ <u>MemberDeta</u> verID@&FamilyID=@Q	ils? ueryColumn.FamilyID@

After you have finished adding your variables to the URL, click OK to go back to the drilldown list. From here you will need to add a name to your Drilldown and select OK to save it. This does not permanently save the drilldown for the report. You must save the report as well.

Ger	neri	c Repo	rt Writ	er						
F	Rig	iht Clio	:k Dri	lldowi	ns 🚹					
	b	×	<b>*</b>	•		🖋 Insert Variable	😭 Drilldown URL P	roperties	Required Columns	
		Name			~	Drilldown Url				
		Membe	er Prof	ile		https://staffymcavbr	.sgasoftware.com/Sa	les/Member	rDetails?MemberID=@	Query
L	ſ									

To test your drilldown, display the report and right click on a row. This should now show the drill down that you added.

		·		
	Participant Nan	ne	Age	Birthdate
300-001-2017-04-30120-01				
Youth Swim Basics				
Mon Tue Wed Thu				
4:15 PM to 4:55 PM				
61184-0	Ross III, Rober	t	8	4/20/2011
108889-2	Foster, Ansc	Drill Down to	View	4/2009
108889-1	Foster, Eve	Member Pro	file	/2008
16717-3	Ray, Parker		11 \$	15/2008

If the link does not navigate to where you expect it too, make sure that you have all the appropriate variables. After double checking your link, if it still does not work, please send an email to support@sgasoftware.com, In order to troubleshoot effectively, please include the following

- The report
- The link that you wish to navigate to (Ex.

https://staff**yourymca**.sgasoftware.com/Sales/MemberDetails? MemberID=61184&FamilyID=0)

• The altered URL that you are using

(Ex. https://staff**yourymca**.sgasoftware.com/Sales/MemberDetails? MemberID=@QueryColumn.MemberID@&FamilyID=@QueryColumn.FamilyID@)