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 🔒 sta	ffymcavbr.sgasoftware	.com/Sales/Membe	erActivity?Activi	tyCode=400-003-	2020-10-40	708-01&Mode	=1	
Apps	A D	Dev and Master Sites	Sales Clients	ESXI Per	sonal				
the	YMCA of Staff	Virginia's Blue R	idge						
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 0 400-003	Code: -2020-10-4070	N8-01 Timeframe			12/31/9999	Activity Sta	▼ Active	Status: 3rd Pa	arty: P
Product (All)	Гуре:	Product •	ID:	Dit ID:	ළ 🗌 Only activi	ties with a l	balance	Disp	olay 👔
Details C	Cancel Change	e Dates Transactions	G/L Transactions	Invoice Paym	ent Plan Recurrin	ig Billing M	isc Info Roste	r 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:		/SGA Master Sales Reports/Programs/Rosters/_Queries	
Query: Description:		Roster 🔹 🔁 📓 🗙	
		Prints one page per offering. 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

	Ri	ght Clic	k Drill	down	s 🚯				
	en.	×	*	ŵ	4	🔎 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://staffymcaybr.sgasoftware.com/Sales/MemberDetails?MemberID=&EamilyID=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				m/Sales/ <u>MemberDeta</u> erID@&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.

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F	Rig	iht Clio	:k Dri	lldowi	ns 🚹					
	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 Nam	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	4/20/201
108889-2	Foster, Ansc	Drill Down to	View	4/20
108889-1	Foster, Eve	Member Prot		/200
16717-3	Ray, Parker		11	····//15/200

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@)