# Salesforce Certified Admin and App Builder

## Lesson 10—Reports

simplilearn

## What You'll Learn

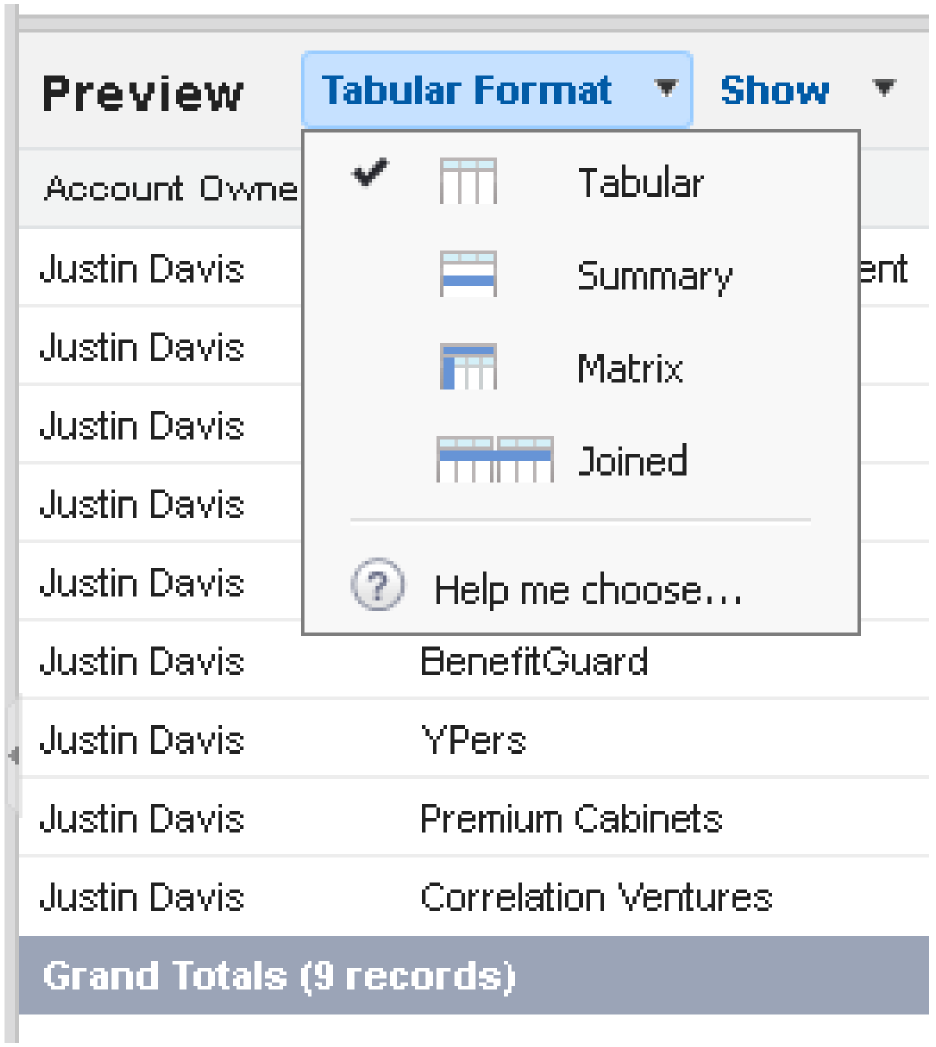
- Creating different Reports, Report Chart, and Custom Report Type
- Scheduling Reports
- Summarizing and Grouping data
- Creating Report Formulas
- Exporting Report data to Excel

# Understanding Report Formats

# Understanding Report Formats

Reports can be viewed in the following formats:

- Tabular format is the basic format.
- Summary format allows one level of grouping.
- Matrix format allows two levels of grouping.
- Joined format allows two reports to be viewed side-by-side.



# Tabular Reports

# Tabular Reports

- Simplest form of reports
- Contain an ordered set of fields in columns
- Can be used to create lists of records
- Can also be used to show a list with a single grand total
- Cannot be used to create groups of data or charts
- Cannot be used to create summary
- Cannot be used in dashboards unless rows are limited

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export De

Limited Display:
Limited to **10 rows**, sorted **Ascending** by **Dice JobForm: Dice JobForm Number** Clear

| Dice JobForm: Dice JobForm Number | First Name | Last Name | Preferred Country | Salary Expected |
|---|---|---|---|---|
| Form-11 | Jack | - | Australia | - |
| Form-12 | Andy | - | Australia | - |
| Form-13 | Tom | Bishop | Australia | - |
| Form-14 | Johnson | - | India | - |
| Form-15 | Randy | - | Australia | - |
| Form-16 | Rojer | - | Australia | - |
| Form-17 | HARRY | - | Australia | $1 |
| Form-18 | john | - | Australia | - |
| Form-19 | john | - | Australia | - |
| Form-2 | Mahalaxmi | Test | USA | $10,000 |
| **Grand Totals (10 records)** | | | | |

# Summary Reports

# Summary Reports

- Provide a listing of data with groupings of rows and display of subtotals
- Can be used to display subtotals based on the value of a particular field
- Are also used to create a hierarchically grouped report
- Can be used to create a chart
- Can be used to source dashboard components

| Dice JobForm: Dice JobForm Number | First Name | Salary Expected | Experience |
|---|---|---|---|
| **Preferred Country:** Australia **(18 records)** | | | |
| Form-3 | Rama | - | - |
| Form-7 | john | - | - |
| Form-23 | Barack | - | - |
| Form-4 | john | - | - |
| Form-5 | john | - | 2 |
| Form-6 | Matt | - | 5 |
| Form-12 | Andy | - | 1 |
| Form-17 | HARRY | $1 | - |
| Form-15 | Randy | - | 2 |
| Form-9 | Harika | - | - |
| Form-11 | Jack | - | 2 |
| Form-16 | Rojer | - | 2 |
| Form-8 | Manpreet | - | - |
| Form-13 | Tom | - | 2 |
| Form-18 | john | - | 1 |
| Form-19 | john | - | 2 |
| Form-21 | Rashmi | $20,000 | - |
| Form-24 | john | - | 2 |
| **Preferred Country:** India **(1 record)** | | | |
| Form-14 | Johnson | - | 1 |
| **Preferred Country:** UK **(1 record)** | | | |
| Form-25 | Johnson | - | 1 |

# Matrix Reports

# Matrix Reports

- Allow grouping records by both rows and columns
- Similar to summary reports except that they permit two-level grouping
- Help in comparing related totals with totals of both rows and columns
- Can be used to see data in two unrelated dimensions, such as date and product

| | | | Preferred Country | | | | Grand Total | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Languages Knows | | Australia | India | UK | USA | | Dice JobForm: Dice JobForm Number | First Name | Experience |
| | APEX(Salesforce) | Record Count | 18 | 1 | 1 | 0 | 20 | | | |
| | | | 1 | | | | | Form-3 | Rama | - |
| | | | 1 | | | | | Form-7 | john | - |
| | | | 1 | | | | | Form-23 | Barack | - |
| | | | 1 | | | | | Form-5 | john | 2 |
| | | | 1 | | | | | Form-12 | Andy | 1 |
| | | | 1 | | | | | Form-15 | Randy | 2 |
| | | | 1 | | | | | Form-11 | Jack | 2 |
| | | | 1 | | | | | Form-16 | Rojer | 2 |
| | | | 1 | | | | | Form-13 | Tom | 2 |
| | | | 1 | | | | | Form-19 | john | 2 |
| | | | 1 | | | | | Form-24 | john | 2 |
| | | | 1 | | | | | Form-21 | Rashmi | - |
| | | | 1 | | | | | Form-18 | john | 1 |
| | | | 1 | | | | | Form-8 | Manpreet | - |
| | | | 1 | | | | | Form-9 | Harika | - |
| | | | 1 | | | | | Form-17 | HARRY | - |
| | | | 1 | | | | | Form-6 | Matt | 5 |
| | | | 1 | | | | | Form-4 | john | - |
| | | | | 1 | | | | Form-14 | Johnson | 1 |
| | | | | | 1 | | | Form-25 | Johnson | 1 |
| | APEX(Salesforce); C++; Dotnet | Record Count | 0 | 0 | 0 | 1 | 1 | | | |
| | | | | | | 1 | | Form-2 | Mahalaxmi | - |

You can summarize opportunities by month vertically and by clients horizontally in a matrix report.

# Join Reports

# Join Reports

- A special type of report that contains multiple blocks within it. Each block contains related information
- Each block can own unique columns, filters, and sort order
- Can be used to group and show data from multiple report types in different views
- By connecting objects together using relationship, you can also show data from different objects in different blocks

| First Name | Last Name | Experience | Languages Knows | Geo Location (Latitude) | Geo Location (Longitude) |
|---|---|---|---|---|---|
| **Preferred Country:** Australia (17 records) | | (17 records) | | (17 records) | |
| Drop a field here to group across report blocks. | | | | | |
| Rama | - | - | APEX(Salesforce) | - | - |
| john | - | - | APEX(Salesforce) | - | - |
| Barack | Obama | - | APEX(Salesforce) | - | - |
| john | - | - | APEX(Salesforce) | 23.4632 | 98.5492 |
| john | - | 2 | APEX(Salesforce) | - | Chat |

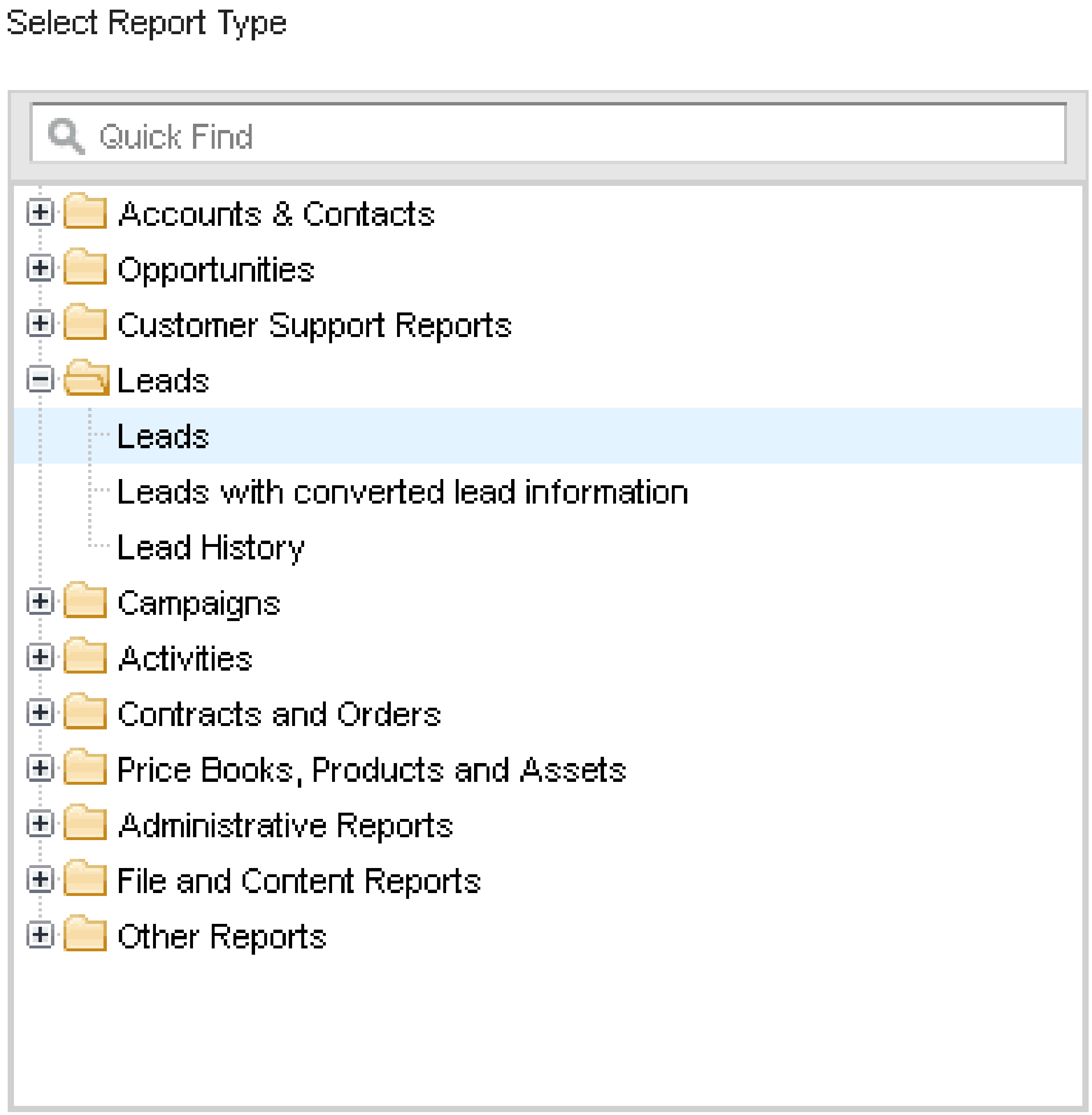
You can summarize opportunities by month vertically and by clients horizontally in a matrix report.

# Creating a Leads Report

# Creating Leads Report

Typically, Leads Reports include Report on the following:

- Existing leads
- Converted lead information
- Field history on leads if enabled

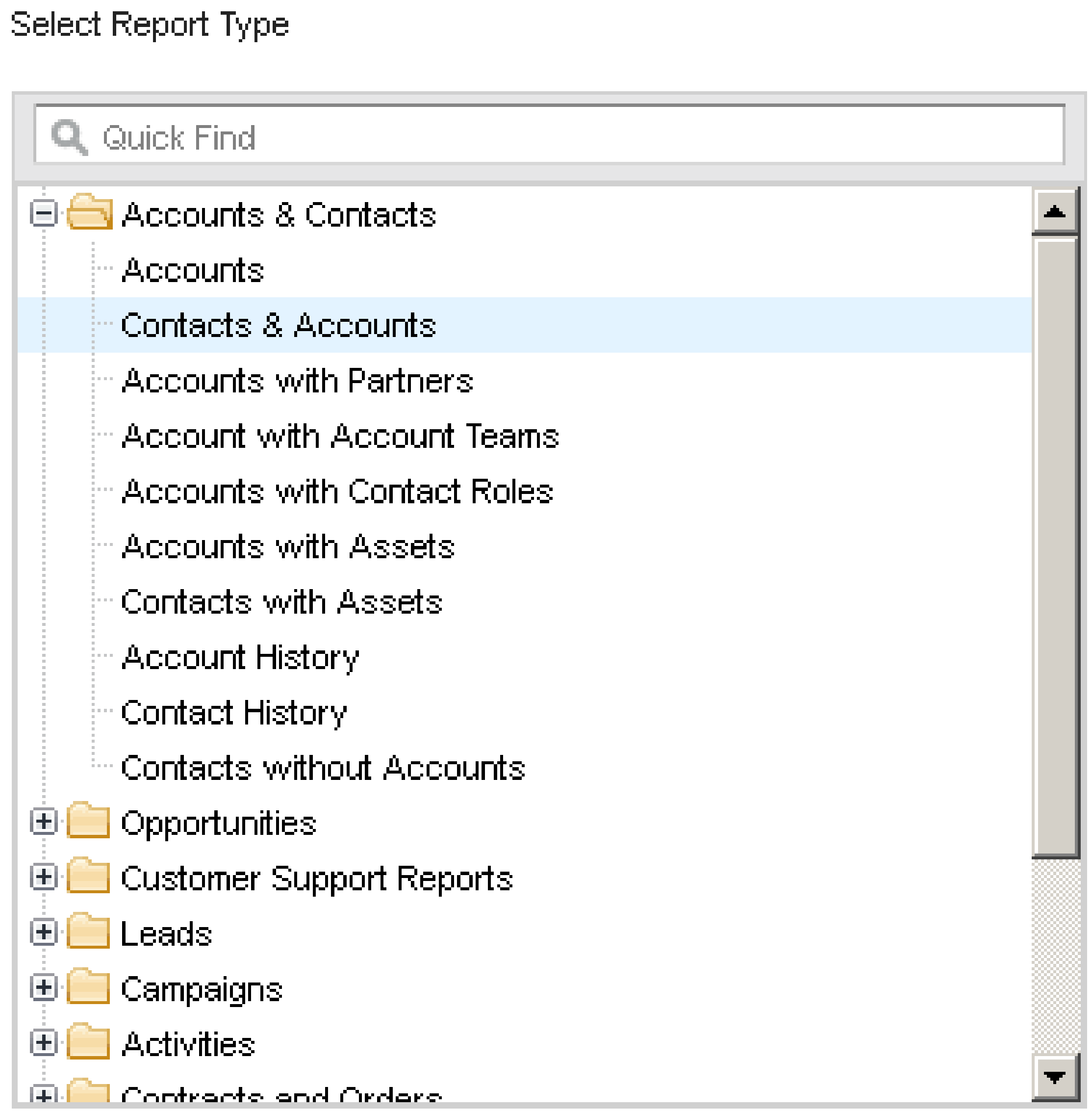


# Creating Contacts and Accounts Report

# Creating Contacts and Accounts Report

You can use the Contacts and Accounts Report for the following:

- Report on contacts associated with accounts
- Create a contact and account history report
- Create a report with related teams, roles, and assets

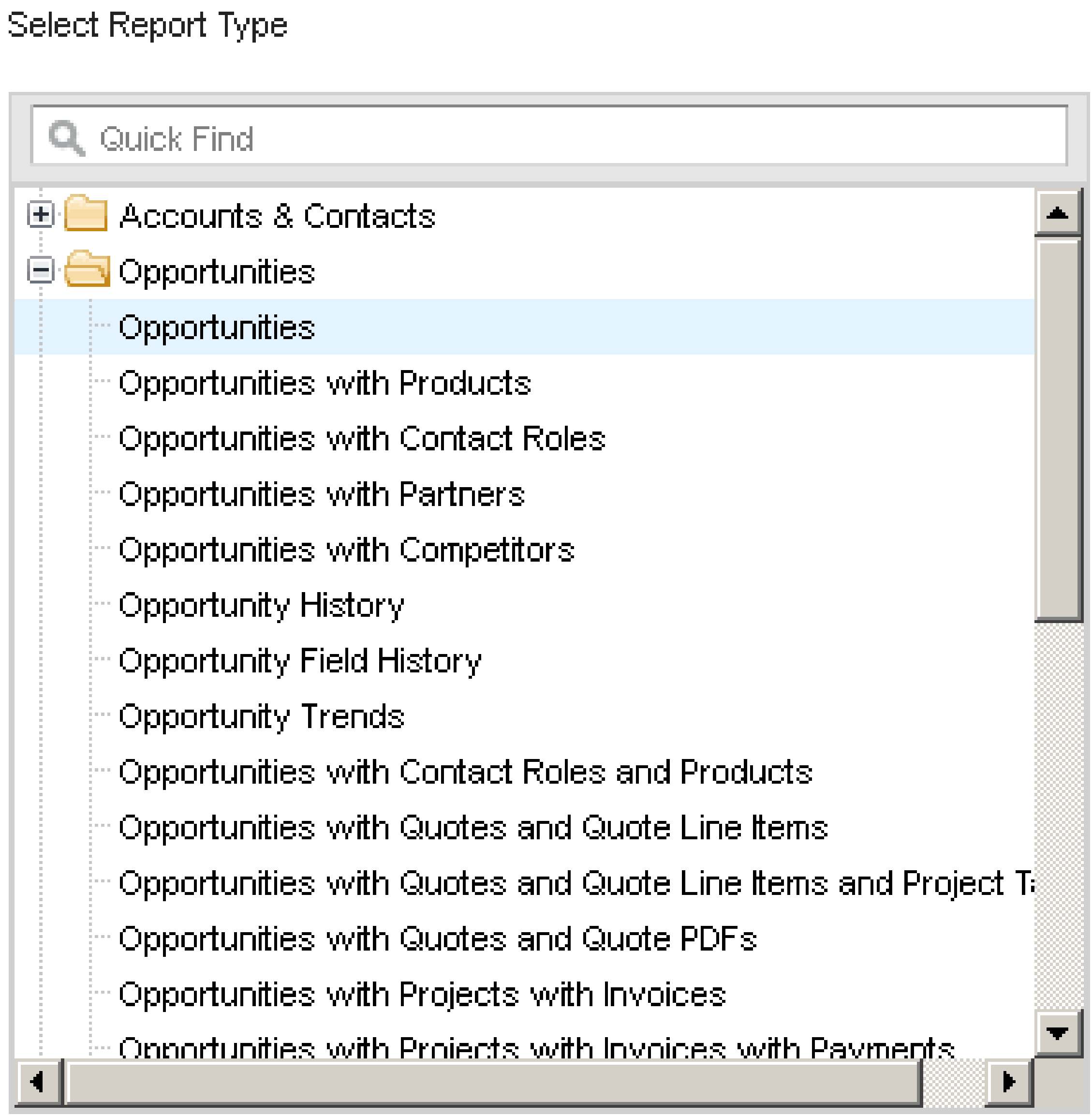


# Creating an Opportunity Report

# Creating an Opportunity Report

You can use the Opportunity Report for the following:

- Report on open or closed opportunities
- View with products, contact roles, partners, or competitors
- View opportunity field history
- Report on Opportunities with Quote information

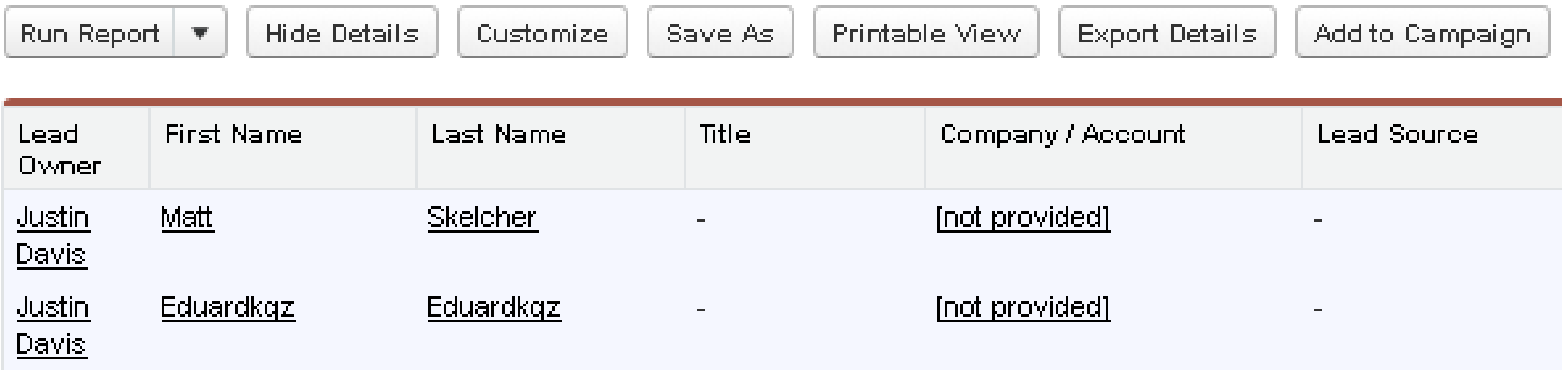


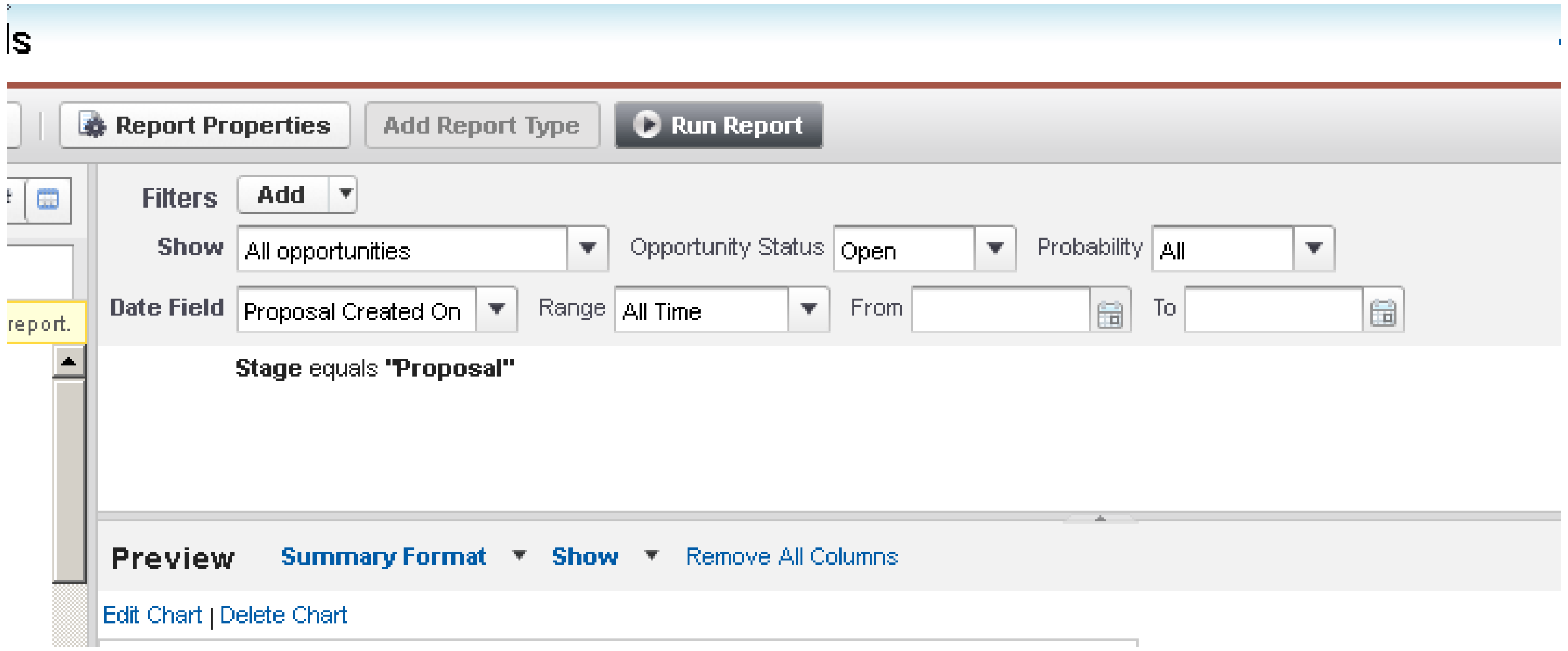
# Adding Leads to a Campaign from a Report

# Adding Leads to a Campaign from a Report

Keep the following points in mind while Adding Leads to a Campaign from a Report:

- Create a standard leads report
- Adjust columns and filters as desired
- Click the black Run Report button
- Click Add to Campaign to add leads to the desired campaign



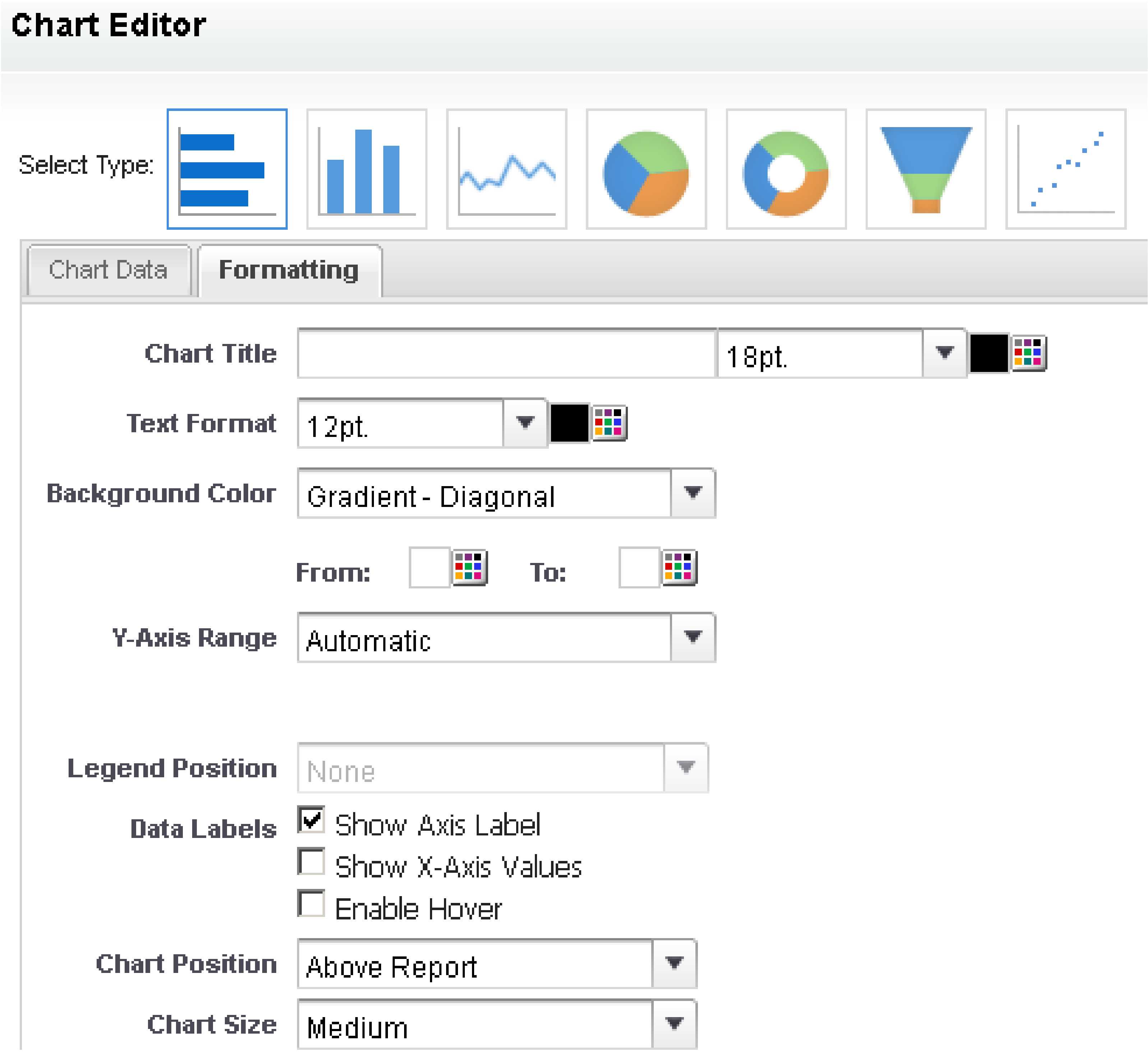



# Creating a Report Chart

# Creating a Report Chart

Keep the following points in mind while creating a Report Chart:

- Compatible with Summary and Matrix report types
- Choose from horizontal or vertical bar, line, pie, donut, funnel, or scatter
- Modify chart title, text, background color, position, and size
- Plot additional values

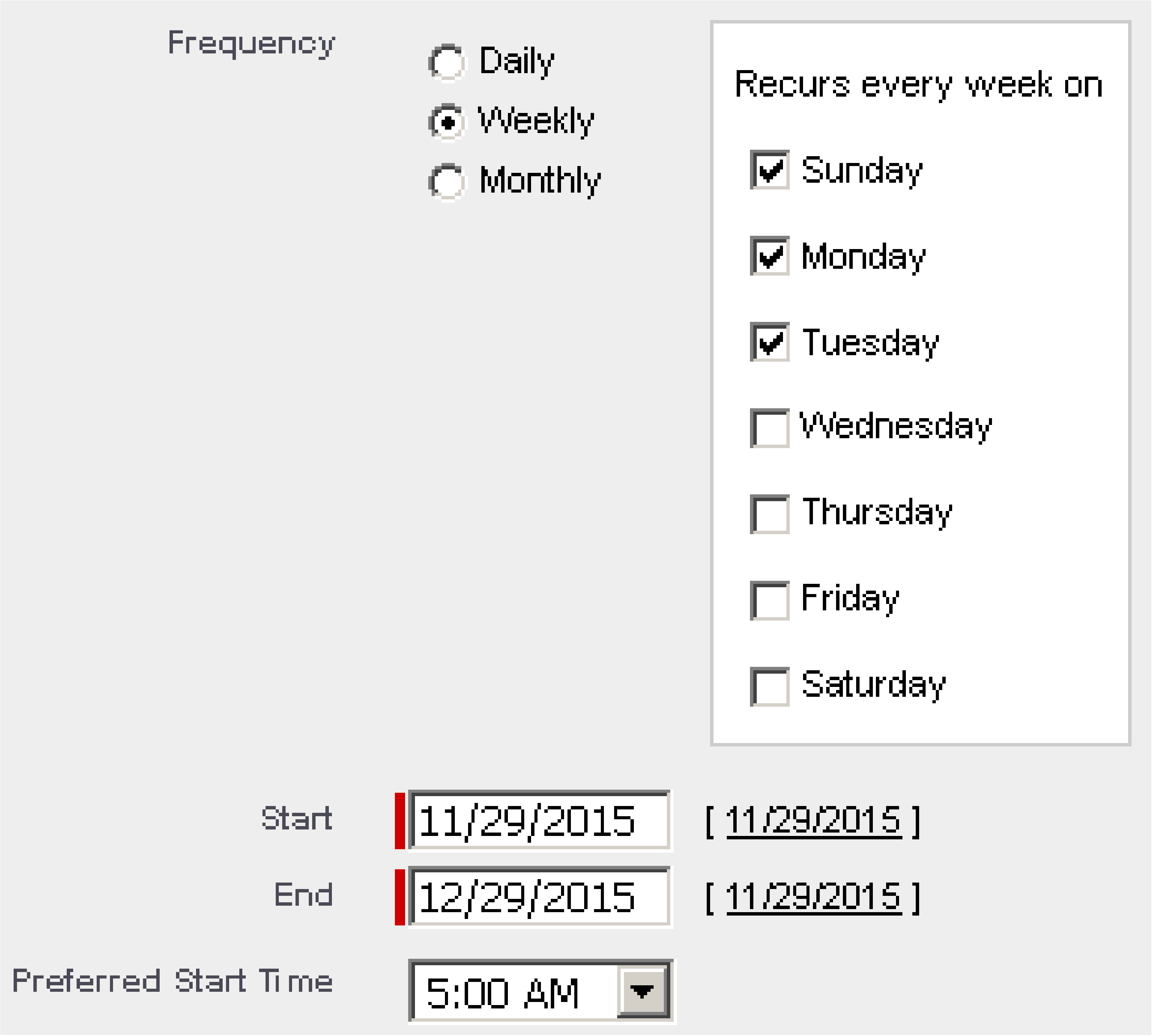


# Scheduling Reports

# Scheduling Reports

Keep the following points in mind while Scheduling Report:

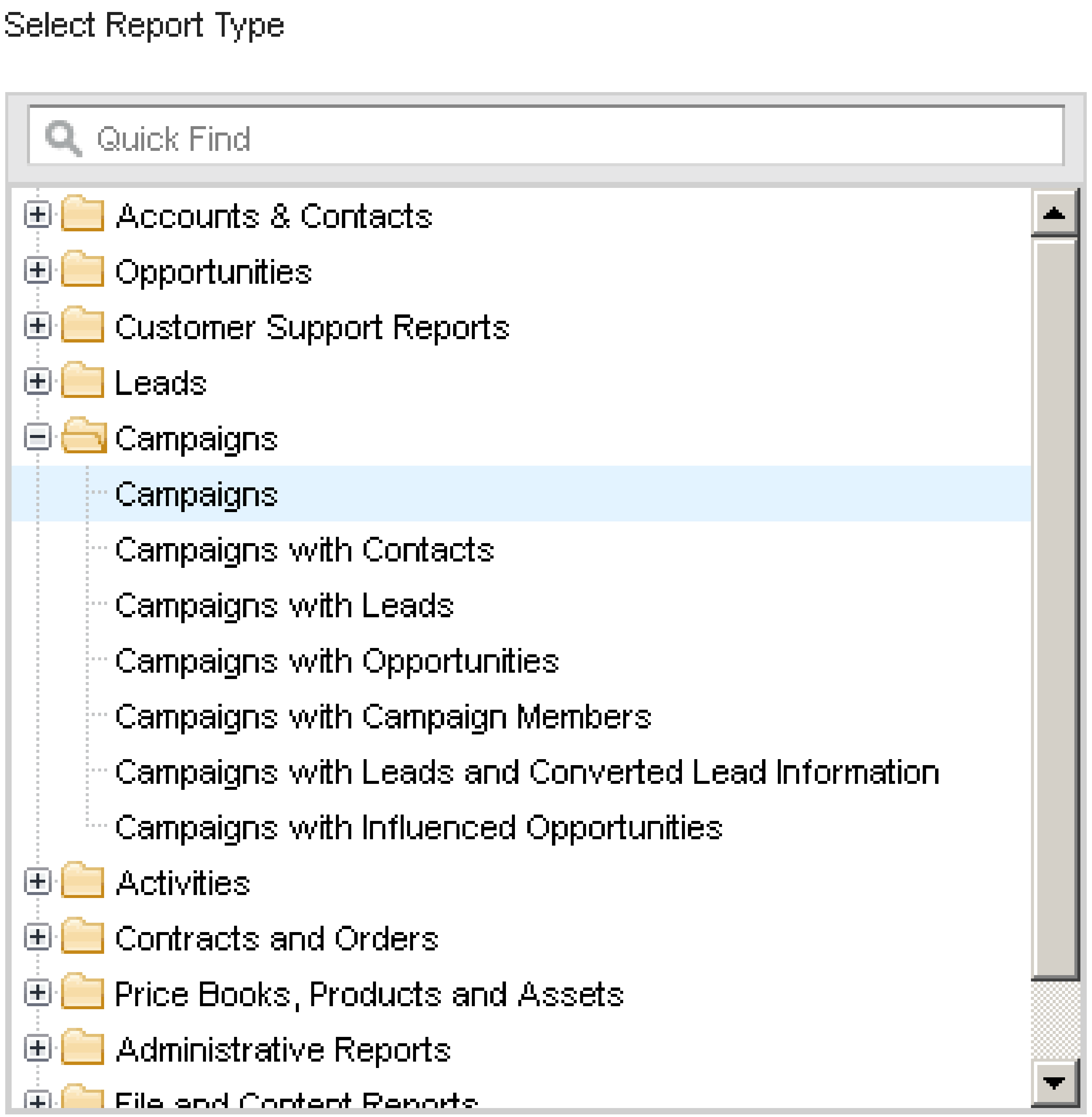
- Choose specific active users or groups to receive the report
- Schedule daily, weekly, or monthly, at specific times
- Schedule a start and end date for automatic running



# Creating a Campaign Report

You can use the Campaign Report for viewing the following :

- Campaign field data
- Campaigns with associated campaign members
- Campaigns with associated leads, contacts, or opportunities

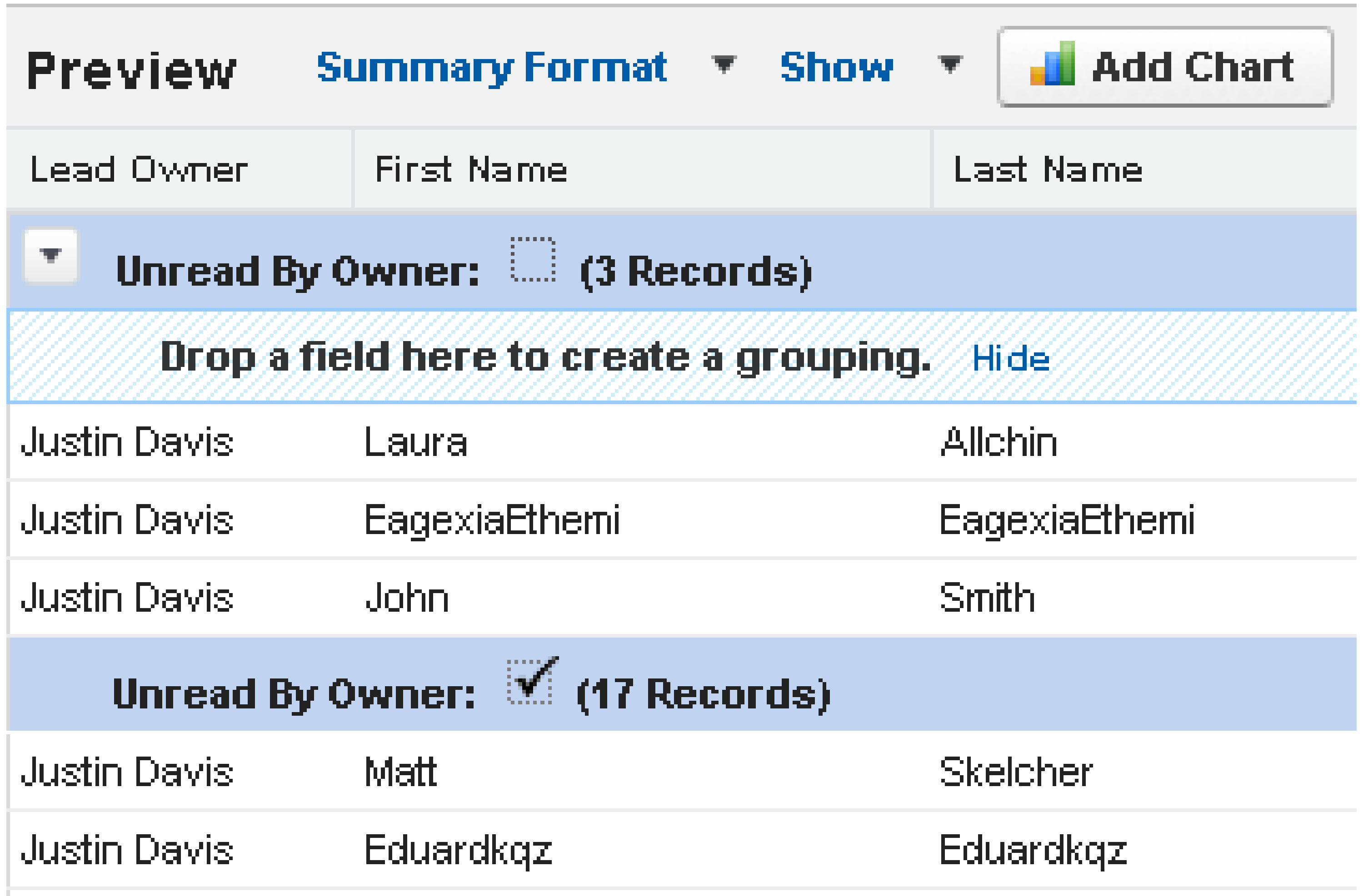


# Summarizing Report Data

# Summarizing Report Data

Keep the following points when summarizing report data:

- Most fields on records can be used to create groupings
- Numeric fields can be summarized for sum and average amounts
- Charts can be added to display summaries

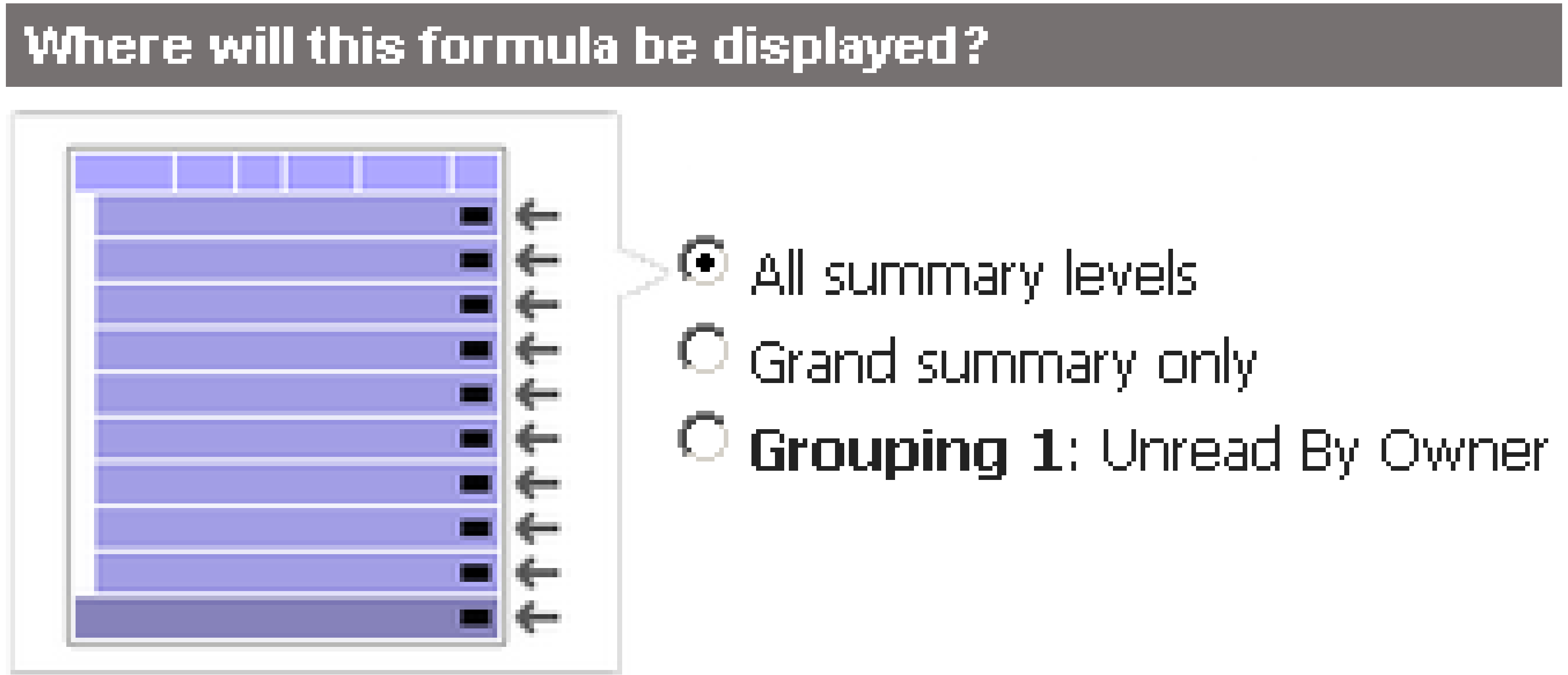


# Creating a Report Formula

# Creating a Report Formula

Keep the following points in mind when creating a formula:

- Formulas can be displayed at all summary levels, grand summary, or a specific grouping
- Formulas can be numbers, percentage, or currencies
- Formulas can show up to 18 decimal points
- All Salesforce functions and operators can be used



# Exporting Reports to Excel

# Exporting Reports to Excel

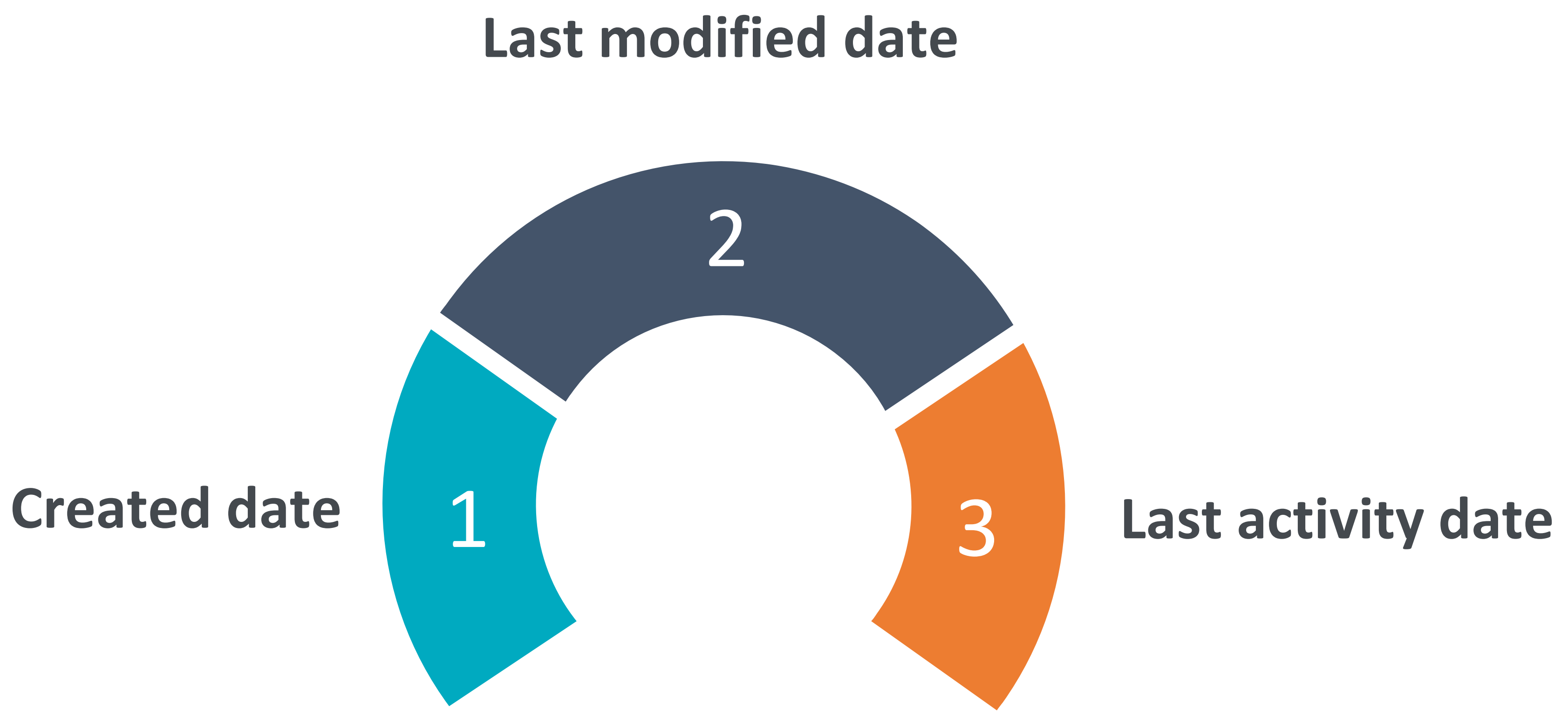
Keep the following points in mind when exporting to spreadsheet:

- Reports can be exported to .csv or .xls format
- Exported reports do not maintain formatting
- Files are downloaded wherever your browser saves downloads

# Date Filters

# Date Filters

When reports contain many records, you’ll need a mechanism to filter the records and see only the required fields. In Salesforce reports, “Date filter” is the default for every report. You can select specific records from the entire records present in the object with parameters such as:



# Bucket Fields

A bucket field in Salesforce reports is used to group values based on categories known as buckets.

Bucketing lets you group report data or records without creating a formula or custom fields.

You can group only records of the following data types: picklist, number, and text.

Assume that you want to create a bucket field 'Amount' using the 'Salary' field. To do so, you'll have to create buckets that group records in the following manner:

Salary > 80k = "High"

Salary > 30k < 80k = "Medium"

Salary < 30k = "Small"

# Custom Report Types

Custom report types are created by the user.

**Benefits**

- It helps in getting cross object fields for reporting
- With custom report types, formula fields are not required

**Drawbacks**

- When the new field is created, a new field must be manually added to all existing custom report types
- Changing the objects in a custom report type that is used by reports destroys all reports built using the custom report type


Quiz

QUIZ

1

Which is not an available report format in Salesforce?

a. Tabular

b. Summary

c. Matrix

d. Composite

QUIZ

1

Which is not an available report format in Salesforce?

a. Tabular

b. Summary

c. Matrix

d. Composite

The correct answer is d.

**Composite is not a report type available in Salesforce.**

QUIZ 2

What formats can Salesforce reports be exported in?

a. .csv and .xls

b. .csv and .xlsx

c. .pdf and .csv

d. .pdf and Word

QUIZ

2

What formats can Salesforce reports be exported in?

a. .csv and .xls

b. .csv and .xlsx

c. .pdf and .csv

d. .pdf and Word

The correct answer is a.

**Salesforce reports can only be exported in .csv and .xls formats.**

| QUIZ 3 | What type of report is required for grouping on rows and columns? |
|---|---|

a. Tabular

b. Summary

c. Matrix

d. Joint

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## QUIZ 3

What type of report is required for grouping on rows and columns?

a. Tabular

b. Summary

c. Matrix

d. Joint

The correct answer is **c**.

**A matrix report is required for grouping on both rows and columns.**

**QUIZ 4**

Who can receive email reports from Salesforce?

a. Anyone with an email address

b. An active Salesforce user

c. Any Communities user

d. System Administrators

QUIZ

4

Who can receive email reports from Salesforce?

a. Anyone with an email address

b. An active Salesforce user

c. Any Communities user

d. System Administrators

The correct answer is **b**.

**Any active Salesforce user can receive reports via email.**

QUIZ

5

What type of fields are compatible with report formulas?

a. Text

b. Picklist

c. Numeric

d. Phone

 

## QUIZ 5

What type of fields are compatible with report formulas?

a. Text

b. Picklist

c. Numeric

d. Phone

The correct answer is c.

**Only numeric fields, such as currencies and integers can be used in report formulas.**

# Case Study

# Case Study 1

Scenario | Analysis | Solution

United Containers needs to understand better where leads are coming from. Currently they run multiple online campaigns, but don’t know where sales ultimately originate. This is causing problems between the sales and marketing departments. The marketing department insists upon renewing campaigns the salespeople don’t find productive. United Containers needs the ability to segment out sales by marketing efforts.

Scenario | Analysis | Solution

United Containers decided to use reports in Salesforce for the following reasons:

1. Reports can be created to display campaign-specific information.
2. Formulas can be added to show return on investment for marketing activities.
3. Salespeople can segment lead temperature through report creation.

Scenario | Analysis | **Solution**

United Containers performed the following steps to remedy their situation:

1. A YTD leads report called “Leads This Year”, grouped by campaigns, was created and saved.
2. The “Leads This Year” report was placed on a Dashboard for marketing reports.
3. Vertical charts displayed the campaigns that yielded the most in new leads.

# Case Study

Scenario | Analysis | Solution

United Containers is generating new leads and proposals in different territories from marketing, but some salespeople have to work harder than others to close those sales. For example, in the western region, ten new leads are required to make one sale, but in the eastern region, only three new leads are required. United Containers is struggling to understand if there is an issue with the salespeople, or the leads.

Scenario | **Analysis** | Solution

United Containers chose to create reports for the following reasons:

1. Regional lead reports can be created.
2. Reports can be analyzed to compare total new leads vs. total new sales.
3. The marketing department can adjust marketing spend based on most effective areas.

Scenario | Analysis | Solution

United Containers performed the following steps to solve their business need:

1. The System Administrator created reports displaying leads, grouped by salesperson.
2. A formula was added to the report to compare total records vs. converted leads.
3. A chart was created to display the percentage of converted leads by salesperson.

# Key Takeaways

- Reports can be created with summaries and groupings.
- Reports must be modified to be displayed on Dashboards.
- Reports can be exported directly to spreadsheets.

This concludes ‘Reports.

The next Lesson is ‘Dashboards.’