Analyze Your Salesforce Data

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ANALYZE YOUR SALESFORCE DATA

How Salesforce Analytics Works

Salesforce offers a powerful suite of analytics tools that work together to help you view and analyze your data.

Salesforce analytics consists of several integrated parts:

Report Types on page 58

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of pre-defined standard report types; administrators can create custom report types as well.

For example, an administrator can create a report type that shows only job applications that have an associated resume; applications without resumes won't show up in reports using that type. An administrator can also show records that *may* have related records—for example, applications with or without resumes. In this case, all applications, whether or not they have resumes, are available to reports using that type.

Reports

A *report* returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access.

Dashboards on page 192

Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards.

Follow a dashboard in Chatter to get updates about the dashboard posted to your feed.

Each dashboard has a *running user*, whose security settings determine which data to display in a dashboard. If the running user is a specific user, all dashboard viewers see data based on the security settings of that user—regardless of their own personal security settings. For dynamic dashboards, you can set the running user to be the logged-in user, so that each user sees the dashboard according to his or her own access level.

Folders on page 162

A *folder* is a place where you can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to its contents based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

Analytic Snapshots on page 174

An analytic snapshot lets you report on historical data. Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object. They can then schedule when to run the report to load the custom object's fields with the report's data. Analytic snapshots enable you to work with report data similarly to how you work with other records in Salesforce.

For example, a customer support manager could set up an analytic snapshot that reports on the open cases assigned to his or her team everyday at 5:00 PM, and store that data in a custom object to build a history on open cases from which he or she could spot trends via reports. Then the customer support manager could report on point-in-time or trend data stored in the custom object and use the report as a source for a dashboard component.

See Also:

Share Insights with Dashboards
Create Your Own Custom Report Type

GET STARTED

Get Started with Reports

Set up your reporting environment, use the report builder to create a basic report, and organize your reports to make it easy to find information when you need it. In most cases, you can start with a standard report and customize it to your needs.

You can report on any data you have read or read/write access to. The available data varies depending on your sharing model, but you can almost always report on data owned by or shared with users below you in the role hierarchy, regardless of your sharing model. (Certain sharing models do not allow this.) Salesforce offers two ways to report on information owned by you or users who report to you:

- Some reports have a `View` filter. Choose the “My team's” option, such as “My Team’s Opportunities,” to view data owned by you and users below you in the role hierarchy.
- Some reports, such as opportunity and activity reports, have **Hierarchy** links that allow you to drill down to different data sets based on the role or user hierarchy. If your organization uses territory management, in some reports these links are based on the territory hierarchy.

You can choose to sort the report by record owner or role when customizing the report.

See Also:

Find a Report
Run a Report
Get the Information You Need From the Reports Tab List View
The Report Run Page
Sort Report Results
Print a Report
Organize Reports
Customize the Reports Tab
Report Run Page Options
Improve Report Performance
Build a New Report
Gather Data with Reports
Organize Reports
Build a Report From a Template
Run a Report

Find a Report

Search for a report by name, description, or who created it or modified it last. Filter, sort, or search within a selected folder to refine your results.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To search for reports:	"Run Reports"
To search for dashboards:	"Run Reports" AND access to dashboard folder

1. On the Reports tab, type in the search box.

   Search looks up all folders. Filters are set to `All Items` and `All Types` to display all of the folder's contents.

   Salesforce searches these fields: **Name**, **Description**, **Last Modified By**, or **Created By**. Results are based on an exact match of what you typed with those fields.

   If tagging is enabled and added to a custom report or dashboard, search by its tag in the global search box.
2. Refine results using these options:

To refine results by	Do this
Type	Select a filter:

To refine results by	Do this
	• `Reports` • `Dashboards` • `All Types` Type filters don't apply to report templates in standard report folders.
View	Select a filter: • `All Items` • `Recently Viewed` • `Items I Created` • `Items I’m Following` View filters don't apply to report templates in standard report folders.
A selected folder	Select a folder, then type in the search box. Filters are set to `All Items` and `All Types` to display all of the folder’s contents.
Sorting	Click for the column and select **Sort Ascending** or **Sort Descending**. Sorting applies to all items in the list view, including the ones on subsequent pages.

See Also:

Get Started with Reports
Share Insights with Dashboards
Get Started with Dashboards

Run a Report

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name. If you’re already viewing a report, click **Run Report** to run it immediately or schedule a future run.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To run reports:	“Run Reports”
To schedule reports:	“Schedule Reports”
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

If you don't see any results, check the report for one of these conditions:

- The report didn't return any data. Check your filter criteria to make sure some data is returned.
- Due to field-level security, you don't have access to one of the groupings you selected.
- Your custom summary formula's context didn't match the chart settings. For example, if the formula is calculated for Industry, but the chart doesn't include Industry, no results are returned.
- Your values are out of the range of acceptable values. The maximum value allowed is 999999999999999. The minimum value allowed is -99999999999999.

If your report returns more than 2,000 records, only the first 2,000 records are displayed. To see a complete view of your report results, click **Export Details**.

If your report takes longer than 10 minutes to complete, Salesforce cancels the report. Try the following techniques to reduce the amount of data in your report:

- Filter for your own records, rather than all records.
- Limit the scope of the data to a specific date range.
- Exclude unnecessary columns from your report.
- Hide the report details.

See Also:

Get Started with Reports
The Report Run Page
The Report Run Page
Report Run Page Options
Report Run Page Options
Print a Report
Sort Report Results

Get the Information You Need From the Reports Tab List View

To see the information you want to see about your reports, you can resize, hide, reorder, sort columns, and select the number of records to display in your list view on the Reports tab.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To view the Reports tab:	"Run Reports"

- Customize your list view as follows:

Option	Description
To resize a column	Click and drag its right margin to the preferred size.

Option	Description
To hide a column	Click > **Columns** on any column and deselect the column you want to hide.
To reorder a column	Drag it to where you'd like it to appear.
To sort a column	Click for the column and select **Sort Ascending** or **Sort Descending**. Sorting applies to all items in the list view, including the ones on subsequent pages.
To change the number of records displayed per page	Click in the lower left corner of the list and select the desired setting. You can view 10, 25, 50, 100, or 200 records at a time. When you change this setting, you return to the first page of list results. Once set, however, you view the same number of records throughout the list. The record display setting on the Reports tab doesn't affect list views elsewhere in Salesforce.

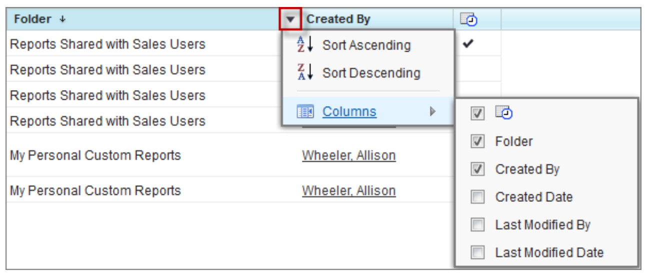


Figure 1: Select Column Header for Sorting and Hiding Columns

See Also:

Get Started with Reports
Gather Data with Reports

The Report Run Page

The Report Run page lets you control what happens to your report when you run it.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To run reports:	"Run Reports"
To schedule reports:	"Schedule Reports"
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

From the report run page, you can:

- Display a Chatter feed of updates and posts about the report.
- View `Report Generation Status`.
- Choose hierarchy options.
- Change top-level groupings using the `Summarize information by` drop-down.
- Change `Time Frame` and `View` options.
- Click **Run Report** to immediately run or schedule the report.
- Click **Show Details** to view all data or **Hide Details** to show only summary information.
- Click **Customize** to open the report in report builder.
- Print or export the report.
- Click **Edit** next to the chart to change its properties, or click **Large**, **Medium**, or **Small** to change its size.
- Sort report results.
- Edit or clear applied filter criteria.
- For summary and matrix reports, filter selected rows by a particular field. Select the rows you want to view, choose a field to group by, then click **Drill Down**. For example, if you created an opportunity report that displays deals by industry, you can select the industries that are doing well and group by `Product Name` to see which products are selling in that industry. Click **Clear** to remove the drill-down filter.

See Also:

Get Started with Reports
Limit Report Results
Report Run Page Options

Sort Report Results

Sort a report by the data in a particular column by clicking on that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To sort report results:	“Run Reports”

Tip: You can also group and subtotal your data to create subsets of information.

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different.

Floating report headers keep the column headings on tabular reports in sight no matter how far users scroll down report results. With floating report headers, users can scroll to the bottom of lengthy tabular reports without having to scroll back to the top to view the names of the column headings. Users can also click floating report headers to sort data in a specific column. When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.

See Also:

Get Started with Reports
Build a New Report
Subtotal Report Results

Print a Report

Print a report from the run page of a report using your browser's print function.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To print reports:	"Run Reports" and "Export Reports"

- Click **Printable View** from the report's run page.
- From the browser dialog, do one of the following:
  - ◊ Open the report with your browser and use your browser's print function.
  - ◊ Save the file in Excel and use the print option in Excel.

See Also:

Get Started with Reports
Export a Report

Organize Reports

Keep your reports at your fingertips by sorting them into folders and moving them around as needed. If you have a lot of reports, you can always use the search field to find the one you need.

See Also:

Get Started with Reports
Gather Data with Reports
Reports Home
Move a Report or Dashboard Between Folders
Delete a Report
Move a Report or Dashboard Between Folders
Delete a Report
Reports Home
Find a Report

Gather Data with Reports

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions. You can examine your organization's data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others via dashboards.

Available in: **All** editions except **Database.com**

A *report* returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. Reports are stored in folders, which control who has access.

See Also:

Organize Reports
Get the Right Data into Your Report
Communicate Your Report Data Effectively
The Report Builder Screen
Build a Report From a Template

Reports Home

The Reports home page is your central place to work with reports and report folders.

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

User Permissions Needed	
To run reports:	“Run Reports”
To schedule reports:	“Schedule Reports”
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

Click the Reports tab to display the reports home page. From this page, you can:

- Search for reports.
- Select or create a folder.

  The Folder drop-down list includes all report folders you can access. The Report Folders section is not available in Personal, Contact Manager, and Group Editions.
- Click the All Reports subtab to see all reports in folders you can access.
  - ◊ Click **Reorder Folders** to change the order that folders appear on the subtab.
  - ◊ Click **Collapse All** or **Expand All** to show or hide reports in folders.
- Click the Recent Reports subtab to see recent reports. Select recently viewed, created, or modified reports using the drop-down.
- Click **Create New Custom Report** to begin a new report.
- Click a report name to run the report.
- If Chatter is enabled, click or to follow or stop following a report in your Chatter feed.
- Click **Edit** next to a report to customize it.
- Click **Del** to remove the report from the report folder. Deleted reports are moved to the Recycle Bin.

  Note: You can't delete reports used by dashboard components or analytic snapshots. To delete the report, you must first delete the dashboard component or analytic snapshot
- Click **Export** to export a report directly to an Excel spreadsheet or CSV (comma-separated values) file.

See Also:

Organize Reports
The Report Builder Screen
Gather Data with Reports

Move a Report or Dashboard Between Folders

It’s a good practice to keep reports and dashboards organized in folders that reflect their function and audience. You can drag and drop reports and dashboards from one folder to another.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To view the Reports tab:	"Run Reports"

Note: You need edit access to folders before moving items between them. Moving items using drag-and-drop isn't supported in accessibility mode.

Move a report or dashboard between folders by dragging from the list view to a report or dashboard folder on the Folders pane.

1. On the Reports tab list view, click and hold an item.

2. Drag the item into its destination folder in the Folders pane.

As you drag an item across a folder, a green check mark (1) indicates that the item can be moved into the selected folder. Conversely, a red icon () means that the item can't be moved into a selected folder.

Keep the following in mind when moving items:

- Drag one item at a time.
- You can't move items from installed AppExchange packages or standard report folders into other folders.

- Move reports into report folders and dashboards into dashboard folders.

See Also:

Organize Reports

Delete a Report

You can delete a selected report from the Reports tab or from its run page.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To delete reports in My Personal Custom Reports folder:	"Create and Customize Reports"
To delete reports in public folders:	"Manage Public Reports"

1. Delete a report in one of two ways:

Option	Description
To delete from the Reports tab	Next to the report, click > **Delete**.
To delete from the report's run page	Click **Delete**.

2. Click **OK**.

   Deleted reports are moved to the Recycle Bin. You can't delete reports in others' personal folders. You also can't delete reports used by dashboard components or analytic snapshots unless you first delete the dashboard component or analytic snapshot.

See Also:

Organize Reports
Prepare Analytic Snapshots
Adding and Editing Dashboard Components in Accessibility Mode
The Report Run Page
Create a Report

Customize the Reports Tab

On the Reports tab, you can modify your personal display to specify the order of the report folders.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To customize the Reports tab:	"Run Reports"

1. Click **Reorder Folders** next to the report subtabs.
2. To reposition the report folders, select a folder in the list box, and click the **Up** or **Down** arrow.

   Tip: Click the **Top** or **Bottom** arrow to move a folder to the top or bottom of the list.

3. Click **Save**.

See Also:

Get Started with Reports
Gather Data with Reports

Report Run Page Options

Customize the report run page to support the specific information you need for the way you work.

The following fields and buttons are available from the report run page, depending on your setup.

Option	Description
Customize	Opens the report builder to help you customize the report.
Date Field	Choose date-specific information about the records: created date, last updated date, and date of last activity.
Delete	Deletes the report. Deleted reports are moved to the Recycle Bin.
Display Currencies Using	Determines the currency type for report subtotals and amounts in the "converted" column of any field. Available only for organizations using multiple currencies. Amounts in reports are shown in their original currencies, and report totals are displayed in your personal currency. To change the currency, click **Show** > **Display Currencies Using**, then select an active currency. For any amount, you can also choose to display the "converted" column (for example, "Annual Revenue (converted)"), which will show amounts in the selected currency.
Division	Determines the division of records to include in the report. Select --Current-- to show records in your current working division. Reports that are already scoped (such as My Cases or My Opportunity Team's Accounts) include records in all divisions. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
Drill Down	For summary and matrix reports, filter selected rows by a particular field. Select the rows you want to view, choose a field to group by, then click **Drill Down**. For example, if you created an opportunity report that displays deals by industry, you can select the industries

Option	Description
	that are doing well and group by `Product Name` to see which products are selling in that industry. Click **Clear** to remove the drill-down filter.
Export Details	Exports data from the report to a Microsoft® Excel spreadsheet or CSV (comma-separated values) file.
Hierarchy	Provides options to view the report data based on role or territory hierarchy. View data for an individual user, a role, or an entire organization. Available only for Professional, Enterprise, Unlimited, and Developer Editions.
Printable View	Lets you display the report in Microsoft Excel format, for easy printing.
Relationship to Opportunity	Specifies a scope based on opportunity ownership or opportunity team; limits the data in an opportunity report.
Range	Specifies a time period for a report. You can limit the data by specific dates using any standard or custom date field defined for the type of record in the report. Works with `From` and `To` fields.
Run Report	Regenerates the report data based on current report settings.
Save	Saves changes to one of your existing custom reports.
Save As	Saves parameter changes to any custom, standard, or public report under a new name, without altering the original report.
Show	Specifies which items to include in the report: just the records you own, or all records to which you have access. Use this option to see team data in your report.
Show/Hide Details	Toggles the display to show all information or just summary information.
Summarize information by	Provides subtotals for the fields you specify.
Units	Choose to view the age of a case in days, hours, or minutes. The age of an open case is the elapsed time from creation to the present. The age of a closed case is the elapsed time from creation to the closing time of the case.

See Also:

Get Started with Reports
The Report Run Page
Creating a Custom Report

Get Started with Dashboards

Once you've found the data you need, use a dashboard to find patterns, stay up to the minute on changes, and share knowledge that you and your co-workers can act on in real time.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To view and refresh dashboards:	"Run Reports" AND access to dashboard folder
To create dashboards:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you created:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you didn't create:	"Run Reports," "Manage Dashboards," AND "View All Data"

- Users with a Salesforce Platform or Salesforce Platform One user license can only view a dashboard if the dashboard running user also has the same license type. Consider creating separate dashboards for users with different license types.
- Dashboards in Group Edition organizations are view-only.

Clicking the Dashboards tab displays the dashboard you viewed most recently. The top of the page shows the time the dashboard was refreshed last and the user whose permissions determine what data is visible on the dashboard. If you can't access a dashboard, verify your folder permissions.

See Also:

Use Dashboards on the iPad
Print a Dashboard
View Dashboard Lists
Refresh Dashboard Data
Filter Dashboard Data
Install the CRM Sample Dashboards from AppExchange
Manage Access to Reports and Dashboards
Share Insights with Dashboards
Refresh Dashboard Data

Use Dashboards on the iPad

Salesforce Mobile Dashboards for the iPad, available from the Apple App Store, lets you access dashboards you recently viewed or are following when you're on the go.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

The mobile dashboards app keeps you in touch with your organization's data, performance, and trends, whether you're in the office or on the road. Use this app to:

- Browse recently viewed dashboards, or ones you're following
- Search for dashboards
- View individual dashboard components, highlight their values, and drill into reports for each
- Modify your report view
- Email a dashboard or an individual component to others
- View, post, and comment on a dashboard's Chatter feed
- When offline, access some dashboards and reports you recently viewed in the app

Note: The app doesn't support dynamic dashboards or dashboard filters.

You can download the app for free from the Apple App Store or from the AppExchange. You can use the mobile dashboards app on all iPad models with iOS 5 or higher. The app is available in Salesforce Enterprise, Unlimited, and Developer Editions, and additionally in any organization that has enabled REST API.

If you can access your Salesforce organization from your iPad, you can use the mobile dashboards app. Open the app and log in using your Salesforce email and password. If you don't have a Salesforce account, you can still explore the app by tapping **Demo**.

Note: Dashboard access for your iPad is available by default for your organization. If it isn't, an administrator must enable it before you can log in to the app.

In the Salesforce Classic client application, the Dashboards tab displays if your Salesforce administrator has added the tab to your mobile configuration.

See Also:

Get Started with Dashboards

Print a Dashboard

Print dashboards using your browser's print option.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To print dashboards:	"Run Reports" AND access to dashboard folder

- Set the paper orientation to print in landscape format so that it is wide enough for all three columns of dashboard components.
- If necessary, resize your columns and remove the browser-imposed headers and footers.

See Also:

Get Started with Dashboards

View Dashboard Lists

The dashboard list contains all the dashboards you can view.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To view and refresh dashboards:	"Run Reports" AND access to dashboard folder
To create dashboards:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you created:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you didn't create:	"Run Reports," "Manage Dashboards," AND "View All Data"

1. From the Dashboards tab, click **Go to Dashboard List**.
   The enhanced Reports tab lists your recently viewed dashboards in that dashboard's folder.
2. On the dashboard list page, select a folder to view a list of dashboards stored in that folder, or search with filters.
3. Click a dashboard name to display the dashboard.
4. Click next to a dashboard name to edit or delete a dashboard.

   Note: Dashboards in Group Edition organizations are view-only.

5. If Chatter is enabled, click or to follow or stop following a dashboard in your Chatter feed.

See Also:

Get Started with Dashboards
Share Insights with Dashboards
Get Started with Dashboards

Refresh Dashboard Data

Click **Refresh** to load the latest data into the dashboard. The data is as current as the date and time displayed after `As of...` at the top right corner of the dashboard.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To refresh dashboard data:	"Run Reports" AND access to dashboard folder

1. Click **Refresh** to replenish your dashboard with the most recent data.
   When dashboard data is being refreshed, the **Refresh** button changes to **Refreshing...** You can leave the dashboard and do other things in Salesforce while the data refreshes.

   Tip: If your dashboard data doesn't refresh after ten minutes, the refresh automatically stops. If necessary, click **Refresh** again.

When you refresh a dashboard, the dashboard data refreshes for anyone else in your organization that has access to that dashboard. Additional refreshes submitted during a refresh and up to one minute after the completion of a refresh are ignored; users view the most current data.

When you change filters on a dashboard, the dashboard shows previously cached data, if it exists. If no data exists, the dashboard fetches the latest. Either way, the dashboard's "Last Refreshed" date shows you the timestamp for the data you're viewing.

See Also:

Get Started with Dashboards

Filter Dashboard Data

As an administrator, you don't need to clone dashboards along with source reports for each subset of data. With a single filtered dashboard, you can serve data needs for a wider audience. Filters are available for both dynamic and standard single-user dashboards. When a dashboard is filtered by a user, the filtered view is saved so that the next time they visit, the same filters are applied to the dashboard data. To see data unfiltered, they can clear each filter on the dashboard.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Create up to 3 filters on a dashboard. Each filter can have up to 10 options defined by filter operators and values. Contact salesforce.com to increase the filter options limit. A maximum of 50 filter options is possible.

You can filter on picklists, lookups, and checkboxes, and on text, numeric, date, and date/time fields.

Note:

- Filters can't be added to dashboards that contain Visualforce or s-control components.
- It's not possible to filter on bucket fields.
- Scheduling or emailing a filtered dashboard returns unfiltered data.

- You can't filter data on a joined report in dashboard view or add a filter to a dashboard that only has joined reports.

See Also:

Get Started with Dashboards
Add a Dashboard Filter
Dashboard Filter Examples
Apply a Dashboard Filter
Data Shown in Filtered Dashboards
Add a Dashboard Filter
Apply a Dashboard Filter
Create a Dashboard
Set Up Dynamic Dashboards

Add a Dashboard Filter

To create a dashboard filter, select a field that contains the type of information you want to filter on, then define how the filter returns the data.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create dashboards:	"Run Reports" AND "Manage Dashboards"

Filters on a dashboard allow you to choose different views of data. Create up to 3 filters on a dashboard. Each filter can have up to 10 options defined by filter operators and values. Contact salesforce.com to increase the filter options limit. A maximum of 50 filter options is possible.

The field you select for the filter may have *equivalent fields*. Equivalent fields share the same underlying object as the field you select for the filter. You can use equivalent fields to filter components that don't have the exact field you selected for the filter, or to filter some components differently. For example, if you filter on the `Account Owner` field, equivalent fields may include `Opportunity Owner` or `Opportunity Created by`, as all three are part of the User object. When equivalents exist for a field, hover over i in the Filter dialog to see the list.

When you edit a dashboard, you can see how each component is being filtered under `Filtered By`. If equivalent fields are available for a component, you can select a different field to filter the component.

1. Create a dashboard with at least one component and data source (report).
2. Click **Add Filter**.
3. Select the field to filter on from the `Field` drop-down. The drop-down shows fields that can be used to filter all components. To see equivalent fields for your selection, click i.
4. Optionally, enter a display label to identify the filter on the dashboard builder and view pages. If your filter has many equivalent fields, we recommend using a label that works for all components.
5. Under Filter Options, select an operator and provide values for the option. Options with multiple values are treated as OR conditions.

6. Click **Add Row** to add additional options.
7. Click **OK**. When you click OK, you can see how the filter is applied on each component. If equivalent fields are available for a component, you can select which one to use to filter the component.

To modify or delete an existing filter, from the filter drop-down, select **Edit Filter** or **Remove Filter**.

See Also:

Filter Dashboard Data
Filter Dashboard Data
Apply a Dashboard Filter
Filter Operators

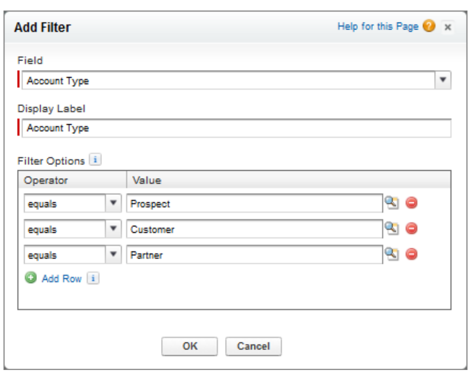
Dashboard Filter Examples

Filters on a dashboard allow you to choose different views of data. When you filter a dashboard, the filtered view is saved on the dashboard until you change filters. Without dashboard filters, you'd have to create multiple dashboards, each with its own set of filtered reports.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

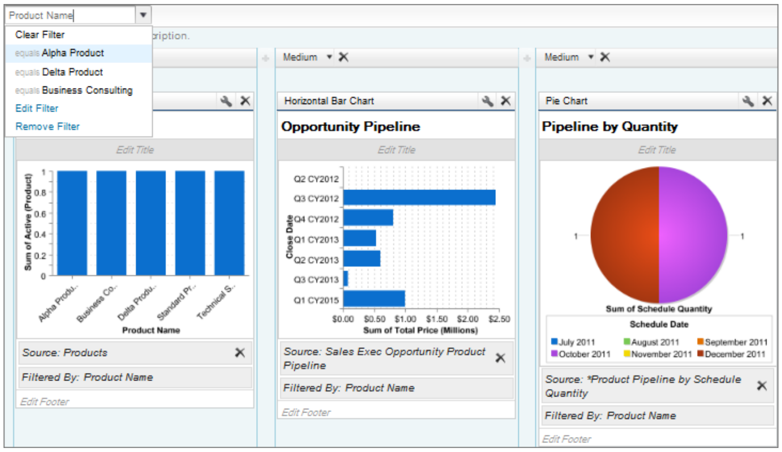
Sales Data for Each Account Type

Filter a sales dashboard to let viewers see sales data for each type of account (prospect, customer, partner, etc.). Create a single dashboard based on a single set of reports, then add a dashboard filter on the `Account Type` field.



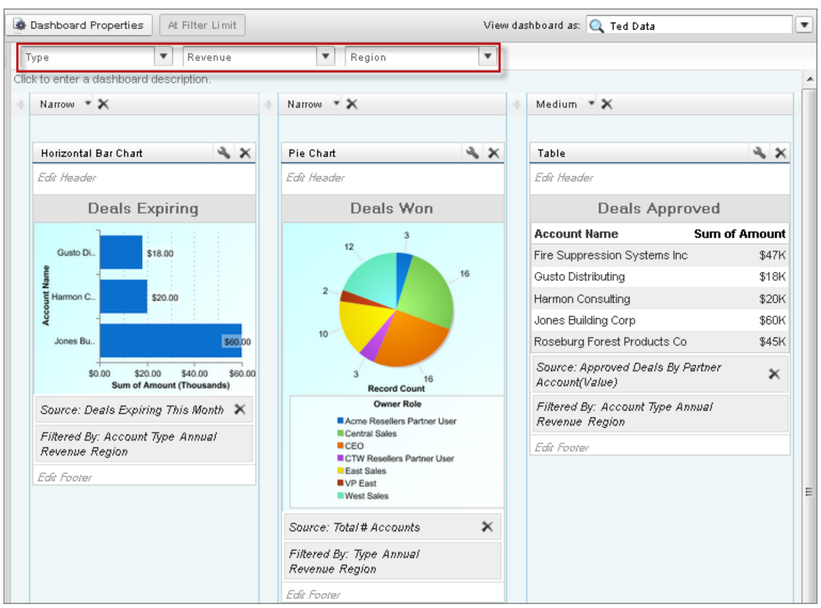
Sales Performance by Products

Create a sales dashboard that lets viewers track sales performance by products. To do so, create a dashboard with key performance indicators, like closed revenue. Add a filter on the `Product Name` field so viewers can see performance by product.



Deals for Different Account Segments

Show how different types of deals are performing across different account segments by creating a dashboard with two filters. Create a filter for `Annual Revenue` that contains several ranges that reflect how your organization segments accounts, then create a filter on opportunity `Type`, and finally add a filter to show deals by `Region`. Create this as a dynamic dashboard to let the entire sales organization use it: managers can use it to view the performance of their teams, while reps can use it to monitor their own performance.



See Also:

Filter Dashboard Data

Apply a Dashboard Filter

Filter a dashboard to analyze the information interactively. When you filter a dashboard, the filtered view is preserved so that the next time you see the dashboard, data is filtered by the same view.

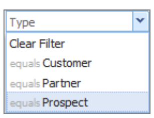
Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To view and refresh dashboards:	“Run Reports” AND access to dashboard folder

Note: All components on the dashboard might not be filtered on the same field. The person who created or edited the dashboard specifies which field is used.

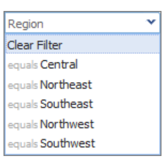
1. Open a dashboard filter.

   Notice how filters you applied last time are selected.
2. Select a filter option from the drop-down.
   For example, select `Type equals Prospect` to show only consulting accounts across all the dashboard components.

3. If the dashboard has additional filters, choose those filter options as well.

   To see data unfiltered, click **Clear Filter** in each dashboard filter drop-down.

See Also:

Filter Dashboard Data
Add a Dashboard Filter
Filter Dashboard Data

Data Shown in Filtered Dashboards

When you change filters on a dashboard, the dashboard shows previously cached data, if it exists. If no data exists, the dashboard fetches the latest. Either way, the dashboard's "Last Refreshed" date shows you the timestamp for the data you're viewing. Click **Refresh** to get the most recent data.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

See Also:

Filter Dashboard Data

Install the CRM Sample Dashboards from AppExchange

Use the CRM sample dashboards from AppExchange as a starting point to build dashboards that meet your business needs.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To install packages:	"Download AppExchange Packages"
To create dashboards:	"Run Reports" AND "Manage Dashboards"

The CRM sample dashboards package from AppExchange offers best practice dashboards with underlying reports that are based on your organization's standard objects and fields. These are sales, marketing, service, and support dashboards you can use to track business processes and key performance metrics for yourself, your team, and your organization. Dashboards in this package include:

- **Sales & Marketing Dashboards**
  - Marketing Executive Dashboard
  - Sales Executive Dashboard
  - Sales Manager Dashboard
  - Salesperson Dashboard
- **Customer Service Dashboards**
  - Agent Supervisor Overview Dashboard
  - Service Executive Overview Dashboard
  - Service KPIs Dashboard

1. In AppExchange, search for "Salesforce CRM Dashboards" and click **Get it Now**.

2. To install the sample dashboards, install the package.

See Also:

Get Started with Dashboards

Manage Access to Reports and Dashboards

Access to reports and dashboards is controlled through settings for the folder they are stored in. To give others access to your reports or dashboards, place them in a shared folder. To prevent others from accessing your reports, place them in personal folders that only you can access.

Available in: **All** Editions except **Database.com**
Report folders not available in: **Contact Manager**, **Group**, and **Personal** Editions

User Permissions Needed	
To create, edit, and delete public report folders:	“Manage Public Reports”
To create, edit, and delete public dashboard folders:	“Manage Dashboards” AND “View All Data”

To access report or dashboard folders go to the Reports tab. On the tab, in the folders pane, click and select **New Report Folder** or **New Dashboard Folder** to create a folder, or click on a folder to edit.

Consider the following when you edit reports or dashboards you didn’t create or when you’re try to share reports with others:

- You can modify the contents of a folder only if the folder access level is set to Read/Write. Only users with the “Manage Public Reports” or “Manage Public Dashboards” can delete or change a Read Only folder. Regardless of permissions or folder settings, you can't edit any unfiled folders or others’ personal folders.
- Administrators, or users with the “Manage Public Reports” and “Create and Customize Reports” permissions, can create custom reports that all users can view. They can also organize reports by creating custom report folders and configuring which groups of users have access to them. Note that public reports and report folders are not available with Personal, Contact Manager, and Group Editions.
- To make a report public, run the report and click **Save As**. Give the report a name and choose a public report folder.

See Also:

Get Started with Dashboards
Access to Report Folders
Access to Dashboard Folders
Access to Report Folders
Access to Dashboard Folders

Access to Report Folders

Folder access is controlled by permissions. Users must have certain permissions to access public, hidden, or shared report folders.

Available in: **All** Editions except **Database.com**

Report folders not available in: **Contact Manager**, **Group**, and **Personal** Editions

The following tables show the permissions that users must have to access the three different types of report folders: public, hidden, and shared folders.

Public Folders

The following permissions apply to folders with these visibility settings:

- `This folder is accessible by all users, including portal users`
- `This folder is accessible by all users, except for portal users`

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
Read	*Any* of the following: • "Run Reports" • "Manage Public Reports" • "View All Data"	*Any* of the following: • "Run Reports" • "Manage Public Reports" • "View All Data"
Write New	"Manage Public Reports"	"Create and Customize Reports"
Modify/Delete	"Manage Public Reports"	"Manage Public Reports"

Hidden Folders

The following permissions apply to folders that have this visibility setting:

- `This folder is hidden from all users`

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
Read	"View All Data"	"View All Data"
Write New	"Manage Public Reports"	"Manage Public Reports"
Modify/Delete	"Manage Public Reports"	"Manage Public Reports"

Shared Folders

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
Read	*Any* of the following: • "Run Reports" (for shared users) • "Manage Public Reports"	*Any* of the following: • "Run Reports" (for shared users) • "Manage Public Reports" (for shared users)

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
	• "View All Data"	• "View All Data"
Write New	"Manage Public Reports"	"Create and Customize Reports" (for shared users)
Modify/Delete	"Manage Public Reports"	"Manage Public Reports"

See Also:

Manage Access to Reports and Dashboards

Access to Dashboard Folders

Folder access is controlled by permissions. Users must have certain permissions to access public, hidden, or shared dashboard folders.

Available in: **All** Editions except **Database.com**
Report folders not available in: **Contact Manager**, **Group**, and **Personal** Editions

The following tables show the permissions that users must have to access the three different types of dashboard folders: public, hidden, and shared folders.

Public Folders

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- `This folder is accessible by all users, including portal users`
- `This folder is accessible by all users, except for portal users`

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
Read	"Run Reports"	"Run Reports"
Write New	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"	*Both* of the following: • "Run Reports" • "Manage Dashboards"
Modify/Delete	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"

Hidden Folders

The following permissions apply to folders that have this visibility setting:

- `This folder is hidden from all users`

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
Read	*Both* of the following: • "Run Reports" • "View All Data"	*Both* of the following: • "Run Reports" • "View All Data"
Write New	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"
Modify/Delete	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"

Shared Folders

Access Level	Permissions to Access Read-Only Folders	Permissions to Access Read/Write Folders
Read	"Run Reports"	"Run Reports"
Write New	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"	*Both* of the following: • "Run Reports" • "Manage Dashboards"
Modify/Delete	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"	*All* of the following: • "Run Reports" • "Manage Dashboards" • "View All Data"

See Also:

Manage Access to Reports and Dashboards

GATHER DATA

Gather Data with Reports

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions. You can examine your organization's data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others via dashboards.

Available in: **All** editions except **Database.com**

A *report* returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. Reports are stored in folders, which control who has access.

See Also:

Organize Reports
Get the Right Data into Your Report
Communicate Your Report Data Effectively
The Report Builder Screen
Build a Report From a Template

Get the Right Data into Your Report

A well-designed report helps you turn raw data into information people can act on. Summarize values and group them into meaningful categories, filter out irrelevant facts, and gather data about multiple objects at once.

See Also:

Gather Data with Reports
Build a New Report
Build a Report From a Template
Create Your Own Custom Report Type
Report on Related Objects with Cross Filters
Categorize Data Quickly with Buckets
Combine Different Types of Information in a Joined Report
Categorize Data Quickly with Buckets
Group Your Report Data
Summarize Your Report Data
Filter Your Report Data
Tips for Working with Cross Filters
Combine Different Types of Information in a Joined Report
Subtotal Report Results

Build a New Report

Report Builder is a drag-and-drop tool for accessing your data quickly and comprehensively. Use it to set up new reports and edit existing ones.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Watch a Demo: Getting Started with Report Builder (2:34 minutes)

To customize an existing report using report builder, click the name of a report and click **Customize**. To optimize screen real estate, report builder uses a compressed page header. To view your application tabs, simply close the builder or click the Salesforce logo.

See Also:

Get the Right Data into Your Report
Choose a Report Type
Choose a Report Format
Create a Report
Creating a Custom Report
Create a Custom Report in Accessibility Mode
Group Your Report Data
Keep Working While Your Report Preview Loads
The Report Builder Screen
Report Fields
Summarize Your Report Data
Filter Your Report Data
Save Your Report
Keep Working While Your Report Preview Loads
Create a Report
Create a Report
Report Fields
Choose a Report Type
The Report Builder Screen
Choose a Report Format
Creating a Custom Report
Combine Different Types of Information in a Joined Report

Choose a Report Type

A report type is a set of rules that determine which records and fields appear in a report. You can start with one of the available standard report types, or use a custom report type provided by your administrator.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Choosing the right report type is one of the most important steps in creating a report.

To create a new report:

1. From the Reports tab, click **New Report**.
2. Select the report type for the report and click **Create**.
3. Customize the report.

See Also:

Build a New Report
Choose a Report Format
Set Up a Custom Report Type

Choose a Report Format

A report can use the tabular, summary, matrix, or joined format. Choose a format that's complex enough to capture the data you want to show, but simple enough to communicate it effectively.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Choose one of the following report formats using the **Format** menu of the report builder. Tabular format is the default.

Format	Description
Tabular	Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total. They can't be used to create groups of data or charts, and can't be used in dashboards unless rows are limited. Examples include contact mailing lists and activity reports.
Summary	Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, subtotaled by `Stage` and `Owner`. Summary reports with no groupings show as tabular reports on the report run page.
Matrix	Matrix reports are similar to summary reports but allow you to group and summarize data by both rows and columns. They can be used as the source report for dashboard components. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date *and* by product, person, or geography. Matrix reports without at least one row and one column grouping show as summary reports on the report run page.

Format	Description
	Building Matrix Reports (2:00 minutes)
Joined	Joined reports let you create multiple report blocks that provide different views of your data. Each block acts like a “sub-report,” with its own fields, columns, sorting, and filtering. A joined report can even contain data from different report types. Introducing Joined Reports in Salesforce (3:19 minutes)

Changing the Report Format

Changing the format affects filters and groupings, as follows:

When you change...	What Happens?
Tabular to Summary or Matrix	The `Rows to Display` filter is removed.
Summary, Matrix, or Joined to Tabular	All groupings, charts, and custom summary formulas are removed from the report. Grouping fields are not converted to columns in the tabular report. If the joined report contained multiple blocks, the columns from only the first block are included in the tabular report.
Summary to Matrix	The first summary grouping becomes the first row grouping. The second becomes the first column grouping. The third becomes the second row grouping. If you're using the report wizard, the third summary grouping is removed.
Matrix to Summary	The first row grouping becomes the first summary grouping. The second row grouping becomes the *third* summary grouping. The first column grouping becomes the *second* summary grouping. The second column grouping is removed. If you're using the report wizard, *both* the second row grouping and second column grouping are removed.
Tabular, Summary, or Matrix to Joined	The existing report becomes the first block in the joined report, and the report type becomes the principle report type for the joined report. Joined report blocks are formatted as summary reports, so if you switch from a summary to a joined report, your groupings stay the same. If you switch from a matrix to a joined report, groupings are converted the same way as when you switch from a matrix to a summary report. The following items aren’t supported in joined reports, and aren’t converted: • Bucket fields • Cross filters

When you change...	What Happens?
	• The `Rows to Display` filter

See Also:

Build a New Report
Choose a Report Type
Create a Report
Build a New Report

Create a Report

If you don't have an existing report to clone, you can create a new report.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

To create a new report:

1. From the Reports tab, click **New Report**.
2. Select the report type for the report, and click **Create**.
3. Customize your report, then save or run it.

See Also:

Build a New Report
Choose a Report Format
Creating a Custom Report
The Report Builder Screen
Run a Report

Creating a Custom Report

You can customize standard reports, or you can build custom reports from scratch to suit the exact needs of your organization.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To run reports:	“Run Reports”
To schedule reports:	“Schedule Reports”
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

Users with the “Manage Custom Report Types” permission can define custom report types that extend the types of reports from which all users in their organization can create or update custom reports. A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of pre-defined standard report types; administrators can create custom report types as well.

Users with the “Manage Analytic Snapshots” permission can create and schedule snapshots. An analytic snapshot lets you report on historical data. Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object. They can then schedule when to run the report to load the custom object's fields with the report's data. Analytic snapshots enable you to work with report data similarly to how you work with other records in Salesforce.

See Also:

Build a New Report
Create a Report
Create a Custom Report in Accessibility Mode

Create a Custom Report in Accessibility Mode

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports”

Note: This topic only applies if you're not using report builder. *Report builder* is a visual editor for reports.

To create a new custom report using the custom report wizard:

1. From the Reports tab, choose the **Create New Custom Report** button.
2. Select the type of data for the report, and click **Next**.

   To create reports on custom objects, choose the **Other Reports** report type category unless the custom object has a relationship with a standard object. When the custom object has a master-detail relationship with a standard object, or is a lookup object on a standard object, select the standard object for the report type category instead.

3. Choose the report format.
4. Follow the steps of the wizard using the **Next** button. For each report, customize the following:

   - **Specify Row and Column Headers:** On the Select Grouping page for summary and matrix reports, choose the fields by which you want to group and subtotal the data. In a summary report, choosing more than one sort field allows you to subsort your data. For matrix reports, select summary fields for the row labels and column headings. When grouping by a date field, you can further group the data by a specific time period such as days, weeks, or months.

     Note: On the Select Grouping page, if you set `Group Dates By` to "Calendar Month in Year" or "Calendar Day in Month," you won't be able to drill down to those date groupings in reports or dashboards. Users are taken to the unfiltered report instead.

   - **Summarize Data:** On the Select Columns to Total page, choose the types of summary information to display for numeric fields.
   - **Build Custom Summary Formulas:** On the Select Columns to Total page for summary and matrix reports, create custom summary formulas to calculate additional totals based on existing report summaries. A formula is an algorithm that derives its value from other fields, expressions, or values. See Build a Custom Summary Formula on page 44.
   - **Choose Fields:** On the Select Columns page, choose the fields to display in the report. You can display only those fields that are visible in your page layout and field-level security settings. If you choose the `Description` field or any other long text field, only the first 255 characters are displayed.
   - Only the first 254 characters in a rich text area or a long text area are displayed in a report.
   - **Order Columns:** On the Order Columns page, select the order for displaying the chosen fields.
   - **Limit Report Results:** On the Select Criteria page, choose the appropriate settings from the drop-down lists, then use the filter options to limit the report to records with specific data.

     The report wizard supports up to 10 filters. On reports with more than 10, additional filters are dropped and the report shows an error for any filter logic.

     Tip: To use a tabular report on a dashboard, first limit the row count, by setting the `Rows to Display` option, the sort column, and the order on the Select Criteria page of the report. You can't use gauge or metric components on dashboards using tabular reports.

   - **Chart Settings:** On the Select the Chart Type and Report Highlights step of the report wizard, set chart properties to display your report data in a chart. Charts are available only for summary and matrix reports.

5. Click **Run Report** to view the report, or click **Export Details** to save the report as an Excel file or other format.

Tip: Customizing your reports can require running them a few times as you adjust the report criteria and options. We recommend using a filter that gives you a smaller sampling of data until you are finished customizing the report and ready to save.

See Also:

Build a New Report
Creating a Custom Report
Group Your Report Data

Group Your Report Data

Group data in columns or rows in summary, matrix, and joined reports to display meaningful information. For example, group opportunities by Close Date to see closed opportunities or group cases by product to see the number of cases for each product. You can have groupings inside groupings.

Available in: **All** editions except **Database.com** Joined reports are available in: **Enterprise**, **Unlimited,** and **Developer** Editions

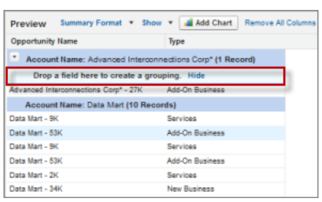
User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Data for Grouping

The Fields pane displays fields from the selected report type, organized by folder. Before you group data in a summary report, drag and drop at least a few fields into the preview pane.

Add a Grouping

Add a group by dropping a field onto a drop zone.



Click **Show** > **Drop Zones** to make them visible. You can also click a column menu for a field in the report and choose **Group by this Field**.

Tip: If you group your report by a date field, you can click the group menu, select **Group Dates By**, and specify the grouping time frame: day, week, month, quarter, year, etc.

Grouping Data in Different Report Formats

Summary and joined reports can have up to three grouping levels. Matrix reports can have two row and two column groupings. For matrix reports, you can't use the same field for both row and column groupings. For joined reports, you can use the fields from the Common Fields category in the Fields pane to group across all report blocks.

Remove a Grouping

To remove a group, click the group menu and choose **Remove Group**. You can also grab the group and:

- Drag it to the column bar to remove the group, but keep the field as a column in the report.

- Drag it back to the Fields pane to remove the group and the field from the report.

Change Order of a Grouping

Drag groups to change their order, or click the group menu and choose **Move Group Up** or **Move Group Down** for column groupings, or **Move Group Left** or **Move Group Right** for row groupings.

See Also:

Build a New Report
Create a Custom Report in Accessibility Mode
Keep Working While Your Report Preview Loads
Report Fields
Subtotal Report Results

Keep Working While Your Report Preview Loads

For most actions, you can continue working on your report while the preview loads. For example, when editing a report you can drag multiple fields into the report, then create a grouping while those columns load.

With report builder, for most actions, you can continue working on your report while the preview loads. For example, when editing a report you can drag multiple fields into the report, then create a grouping while those columns load.

Note: Asynchronous loading isn't available for matrix and joined reports.

You can continue working in the report preview while the following actions occur:

- Add, remove, or reorder fields
- Add or remove summary fields
- Add, remove, or reorder groupings
- Remove formulas

Note: If you remove a summary field or formula used in a chart, the chart reloads, but the report preview loads asynchronously.

You can't work in the report preview while the following actions occur:

- Add or edit formulas
- Remove a report's only grouping
- Remove a column used to limit the row count for a tabular report
- Sort the report by group or column
- Update standard or custom filters
- Change report format
- Show or hide report details
- Add or remove a chart
- Add or remove conditional highlighting
- Change **Group Dates By**

- Change a converted currency field
- Save the report

See Also:

Build a New Report
Group Your Report Data
The Report Builder Screen
Build a New Report
Report Fields

The Report Builder Screen

Report builder is a visual editor for reports. The report builder screen lets you work with report fields and filters, and shows you a preview of your report with just some of the data.

Available in: **All** editions except **Database.com**

To optimize screen real estate, report builder uses a compressed page header. To view your application tabs, simply close the builder or click the Salesforce logo.

Fields Pane

The Fields pane displays fields from the selected report type, organized by folder. Find the fields you want using the Quick Find search box and field type filters, then drag them into the Preview pane to add them to the report.

Create, view, edit, and delete custom summary formulas and bucket fields in the Fields pane as well.

In the joined report format, the Fields pane displays fields from all report types added to the report, organized by report type.

Filters Pane

Set the view, time frame, and custom filters to limit the data shown in the report.

Preview Pane

The dynamic preview makes it easy for you to customize your report. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks. Change the report format and display options, or add a chart.

The preview shows only a limited number of records. Run the report to see all your results.

See Also:

Build a New Report
Keep Working While Your Report Preview Loads
Report Fields
Share Insights with Dashboards
Create a Report
Build a New Report

Report Fields

The Fields pane displays fields from the selected report type, organized by folder. It also lists custom summary formulas, which you can create, edit, and delete.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

Adding Field Filters

With tabular, summary, and matrix reports, you can drag a field from the Fields pane to the Filters pane to add a report filter.

Finding Fields

Find a field by typing its name into the Quick Find search box. You can also filter the list by type:

- Click 

to see all field types, as well as custom summary formulas.
- Click  to see just text fields.
- Click  to see just number fields (numeric, percentage, or currency).
- Click  to see just date fields.

Adding and Removing Fields

To add a field to a tabular, summary, or matrix report, double-click it or drag it into the Preview pane. To add a field to a joined report, drag it to the Preview pane. Press **CTRL** to select multiple fields. Drag an entire folder to add all its fields. If a tabular, summary, or matrix report already contains a field, you can't add it again. You can add the same field multiple times to a joined report as long as you add it to different blocks. In the preview pane, click **Show** > **Details** to see your report fields. While **Show** > **Details** is disabled, you can only add summary fields.

To remove a field, grab its column header and drag it back to the Fields pane. With tabular, summary, and matrix reports, you can click the column menu and choose **Remove Column**, or click **Remove All Columns**.

Working with More than One Field

You can select multiple fields to add, remove, or reorder. For example, you can add `Created By`, `Type` and `Opportunity Name` to your report at the same time.

To select multiple fields or columns, press CTRL (Windows) or Command (Mac).

Note:

- When you add multiple fields, they appear in the report in the order selected.
- For summary and tabular formats, disable **Show** > **Details** when adding multiple summarizable fields to a report. The Summarize dialog automatically appears, letting you select summaries for all the fields at once.
- Enable **Show** > **Details** when adding non-summary fields, such as text fields to a report.

- When working with a joined report, you can select multiple fields from the Common Fields category and one report type. You can't select multiple fields from different report types.

Ordering and Sorting Fields

Reorder report columns by grabbing a column header and dragging it to a new location. Press **CTRL** to select multiple columns. To sort your report by a column, click its column header. You can also click the column menu and choose **Sort Ascending** or **Sort Descending** from the drop-down list. Sort is disabled when **Show** > **Details** isn't selected.

Changing the Currency Displayed

If your organization has enabled multiple currencies, you can change the currency shown for all currency fields. Click **Show** > **Display Currencies Using**, then select an active currency to display.

See Also:

Build a New Report
The Report Builder Screen
Summarize Your Report Data
Work with Formulas in Report Builder
Group Your Report Data
Summarize Your Report Data
Highlight Data Ranges

Summarize Your Report Data

A summary field contains numeric values for which you want to know the sum, the average, or the highest or lowest. Summary fields show at all grouping levels. In summary and matrix reports, they also appear at the grand total level.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

The Fields pane displays fields from the selected report type, organized by folder.

A summary is the `Sum`, `Average`, `Max`, or `Min` for a number field. (Use the # filter to find them faster.)

To add a summary field:

- Double-click a number field in the Fields pane.
- Drag a number field into the preview. Press **CTRL** to select multiple fields. For matrix reports, there are drop zones before, between, and after sets of summaries. For example, the sum, average, max, and min of `Annual Revenue` are a set, and you can't drop a new summary field between them.

- Choose **Summarize this Field** in the column menu for a field already in the report.

To change an existing summary field, or add other summaries on that same field, click next to the summary field and choose **Summarize this Field**.

To remove a summary field:

- Click its menu and choose **Summarize this Field** and deselect all options.
- Click its menu and choose **Remove Summary**.
- Drag the summary set back to the Fields pane. Note that all summaries for that field are removed. Press **CTRL** to select multiple summary fields.

Reorder sets of summary fields in matrix reports by dragging them. The summaries for each field move together when dragged. For example, if your report contains the sum and average of `Annual Revenue`, and the max and min of `Probability`,.you can drag the `Probability` summaries before or after the `Annual Revenue` summaries, but not between. Summaries can't be placed after custom summary formulas or `Record Count`.

See Also:

Build a New Report
Report Fields
Filter Your Report Data
About Summary Functions
Examples of Summary Functions in Reports
Work with Formulas in Report Builder
Use a Summary Function in a Report Formula
Build a Custom Summary Formula
Get the Most Out of Custom Summary Formulas
Subtotal Report Results
Report Fields
Subtotal Report Results

About Summary Functions

Summary functions let you use grouping values in custom summary formulas for reports. Formulas are available with summary, matrix, and joined reports.

There are two summary functions: `PARENTGROUPVAL` and `PREVGROUPVAL`.

PARENTGROUPVAL

Use this function to calculate values relative to a parent grouping.

Description:	This function returns the value of a specified parent grouping. A “parent” grouping is any level above the one containing the formula. You can only use this function in custom summary formulas for reports.
Use:	**Summary and Joined:** `PARENTGROUPVAL(summary_field, grouping_level)` **Matrix:** `PARENTGROUPVAL(summary_field, parent_row_grouping, parent_column_grouping)`

	Where `summary_field` is the summarized field value, `grouping_level` is the parent level for summary reports, and `parent_row_level` and `parent_column_level` are the parent levels for matrix reports.
Example:	`TOTAL_PRICE:SUM/PARENTGROUPVAL(TOTAL_PRICE:SUM, GRAND_SUMMARY)` This formula calculates, for each product, its relative size compared to the grand total. In this example, the report is a summary of opportunities and their products, grouped by `Product Name`.

PREVGROUPVAL

Use this function to calculate values relative to a peer grouping. If there's no previous grouping, the function returns a null value.

Description:	This function returns the value of a specified previous grouping. A "previous" grouping is one that comes before the current grouping in the report. Choose the grouping level and increment. The increment is the number of columns or rows before the current summary. The default is 1; the maximum is 12. You can only use this function in custom summary formulas for reports.
Use:	`PREVGROUPVAL(summary_field, grouping_level [, increment])` Where `summary_field` is the name of the grouped row or column, `grouping_level` is the summary level, and `increment` is the number of rows or columns previous.
Example:	`AMOUNT:SUM - PREVGROUPVAL(AMOUNT:SUM, CLOSE_DATE)` This formula calculates, for each month, the difference in amount from the previous month shown in the report. In this example, the report is an opportunity matrix with columns grouped by `Close Date` and rows by `Stage`.

See Also:

Summarize Your Report Data
Build a Custom Summary Formula
Work with Formulas in Report Builder
Build a Custom Summary Formula for a Joined Report
Examples of Summary Functions in Reports

Examples of Summary Functions in Reports

Three Week Moving Average

To calculate a three-week moving average of opportunity amounts:

```
(OppProductTrends__c.Amount__c:SUM+ PREVGROUPVAL(OppProductTrends__c.Amount__c:SUM,
OppProductTrends__c.as_of_date__c) + PREVGROUPVAL(OppProductTrends__c.Amount__c:SUM,
OppProductTrends__c.as_of_date__c,2))/3
```

See Also:

Summarize Your Report Data

Work with Formulas in Report Builder

Formulas let you create custom summaries based on calculated values using report data. These formulas can then be used as columns in your report.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

The Fields pane displays fields from the selected report type, organized by folder.

To add a new formula to a summary or matrix report, double-click **Add Formula**. Once you define it and click **OK**, it's automatically added to the preview as a column for summary reports, and a summary field for matrix reports. With joined reports, you can add either a cross-block or a standard custom summary formula. To edit a formula, hover over the name in the Fields pane and click .

To remove a formula from the preview, grab its header and drag it back to the Fields pane, or click its menu and choose **Remove Formula**. Press **CTRL** to select multiple formulas. Removing a formula from the preview doesn't delete it. To delete a formula, hover over the name and click , or click **Delete Formula** from the field menu.

Dashboard and report charts that display values from custom summary formulas display decimal places using your default currency setting instead of what you specified for the formula. For example, if the summary formula specifies zero decimal places, no decimal places appear in columns, but chart values show the number of decimal places specified for your default currency (usually two decimal places). This applies to currencies, numbers, and percentages.

See Also:

Summarize Your Report Data
Build a Custom Summary Formula
Report Fields

Use a Summary Function in a Report Formula

Summary functions let you use grouping values in custom summary formulas for reports. Formulas are available with summary, matrix, and joined reports.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Double-click **Add Formula** in the Fields pane.
2. In the Custom Summary Formula dialog, under Functions, select `Summary`.
3. Select `PARENTGROUPVAL` or `PREVGROUPVAL`.
4. Select the grouping level and click **Insert**.
5. Define the formula, including where to display the formula.
6. Click **OK**.

See Also:

Summarize Your Report Data
Work with Formulas in Report Builder
About Summary Functions
Examples of Summary Functions in Reports

Build a Custom Summary Formula

Create custom summary formulas for summary and matrix reports to calculate additional totals based on the numeric fields available in the report.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

A formula is an algorithm that derives its value from other fields, expressions, or values. Custom summary formulas can contain 3900 or fewer characters. Custom summary formulas are available for summary, matrix, and joined reports. They can't be shared across multiple reports.

1. In report builder, click **Add Formula** in the Fields pane.
2. Enter a name for your formula as it will appear on the report. The label must be unique. Optionally, enter a description.
3. From the `Format` drop-down list, select the appropriate data type for your formula based on the output of your calculation.
4. From the `Decimal Places` drop-down, select the number of decimal places to display for currency, number, or percent data types. This setting is ignored for currency fields in multicurrency organizations. Instead, the `Decimal Places` for your currency setting apply.

   If you select **None** for `Decimal Places`, the effective values are:

   - For currency, displays up to 18 digits, with the default decimal-place precision for the currency
   - For percentages, displays up to 18 digits, with no decimal places
   - For numbers, displays up to 18 digits, without changing the decimal-place precision

5. Set the `Where will this formula be displayed?` option. The formula calculation will be displayed in the report at the level you select. To display the formula calculation at every level, including the Grand Total, select `All summary levels`.
6. Build your formula:

   a. Select one of the fields listed in the **Summary Fields** drop-down list. This field's value is used in your formula.
   b. Select the kind of summary type to use in your formula. This option is not available for `Record Count`

Summary Type	Description
Sum	The summary value of data in a field or grouping of fields.
Largest Value	The largest value of data in a field or grouping of fields.
Smallest Value	The smallest value of data in a field or grouping of fields.
Average	The average of data in a field or grouping of fields.

   c. Click **Operators** to add operators to your formula.
   d. Select the function category (All, Logical, Math, or Summary), choose the function you want to use in your formula, and click **Insert**.
   e. Repeat these steps as necessary.

7. Click **Check Syntax** to see if your formula contains errors. Errors are highlighted by the cursor.

8. Click **OK**. Your formula isn't saved until you save the report.

See Also:

Summarize Your Report Data
Build a New Report
Work with Formulas in Report Builder
Get the Most Out of Custom Summary Formulas
Build a Custom Summary Formula for a Joined Report

Get the Most Out of Custom Summary Formulas

Custom summary formulas are a powerful reporting technique, but they can be tricky. Here are some tips to keep in mind when working with them.

Available in: **All** editions except **Database.com**

Functions for use with custom summary formulas in reports are available under the function category. Select a function, then click **Help on this function** for information.

- A summary formula can't reference another summary formula.
- Regardless of the summary formula data type, your summary formula can contain fields of different data types, including: number, currency, percent, and checkbox (true/false) fields. For example, a summary formula in an Opportunities with Partners report can reference opportunity `Amount` or `Stage Duration`, as well as account `Annual Revenue`.
- Dashboard and report charts that display values from custom summary formulas display decimal places using your default currency setting instead of what you specified for the formula. For example, if the summary formula specifies zero decimal places, no decimal places appear in columns, but chart values show the number of decimal places specified for your default currency (usually two decimal places). This applies to currencies, numbers, and percentages.
- When a field is deleted or is unavailable (for example, because of field-level security), all custom summary formulas that contain the field are removed from the report.
- The summary types `Sum`, `Largest Value`, `Smallest Value`, and `Average` are not available for use with the `Record Count` field.
- The `Smallest Value` summary type includes blank (null) or zero values in the summary formula calculation if these values are present in your report data.
- The `Largest Value` summary type includes the largest blank (non-null) value present in your report data.
- Percents are represented as decimals in summary formulas. 20% is represented as 0.20.
- Operators can be used to give fields in summary formulas a negative value. For example: `{!EMPLOYEES:SUM} + -{!SALES:SUM}`.
- For custom summary formulas on matrix reports, Salesforce calculates results for all formulas where the `Where will this formula be displayed?` option is not set to `All summary levels`. The formula determines the value returned. If null is returned, the cell will be empty.
- Summary fields on tabular, summary, and matrix reports can display up to 21-digits. Summary fields of 21 digits will display precisely, but more than 21 digits may not be precise. If "`#Too Big!`" appears in report cells, check your formula for calculations that could result in more than 18 digits. Avoid multiplying large numbers, raising a large number to a power, or dividing by a very small number.
- Formulas treat blank (null) report cells as zero values.
- "`#Error!`" displays on report cells whenever an error occurs while calculating a formula's value. "`#Error!`" also displays when formulas divide by zero. To resolve the error, check your formula and provide an alternative value.

- Cross-block custom summary formulas are available for joined reports.

See Also:

Summarize Your Report Data
Build a Custom Summary Formula
Custom Summary Formulas with Joined Reports
Build a Custom Summary Formula for a Joined Report

Subtotal Report Results

Subtotaling your reports gives you a tool to analyze trends in the data. In summary, matrix, and joined reports, you can group sets of information and compare subtotals for each set against the overall total. In summary and joined reports, you can also subtotal by multiple fields to give you cascading sets of information.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To subtotal report results:	"Create and Customize Reports"

For example, if you subtotal a summary report by Opportunity Owner, the report groups the accounts by Opportunity Owner, lists the number of opportunities owned by each user, and shows subtotals by Opportunity Owner for all the columns in the report. You could further subtotal each user's opportunities by product.

To subtotal your report results:

1. Click **Customize** from any report.
2. In the report builder, add a summary field to the report. Summaries show up at grouping levels as well as for individual rows.

Salesforce uses "smart" totaling when you run reports that include duplicate data in any of the columns chosen for summing or averaging. "Smart" totaling means that duplicate data is counted only once in any subtotal or total. For example, if an opportunity has two products and you run the Opportunity Product Report with the total opportunity amount selected as a column to sum by, the amount appears twice in the details of the report, once for each product on the opportunity. In this case, "smart" totaling correctly calculates any subtotals, grand totals, and averages, adding that opportunity amount only once.

Note: For dashboard components, "smart" totaling isn't used. For example, in a dashboard table, the total displayed is simply the sum of the values listed in the table.

See Also:

Summarize Your Report Data
The Report Run Page
Build a Custom Summary Formula
Build a New Report

Filter Your Report Data

Focus your report on the data you're interested in by setting up standard filters, field filters, filter logic, cross filters, and row limits.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Depending on your organization's setup, you may see additional filters, such as probability, hierarchy, territory, and others.

- Use the `Show` drop-down to select your own, your team's, or all records.
- Hover over a filter to edit or remove it.

See Also:

Build a New Report
Summarize Your Report Data
Save Your Report
Enter Filter Criteria
Build Effective Filters
Filter on Blank Values
Tips for Filtering by Campaign
Tips for Filtering on Multiple Currencies
Add Filter Logic
Getting the Most Out of Filter Logic
Example: Using Row Limits in Report Filters
Filter Choices
Filter Operators
Filter Choices
Filter Operators
Build Effective Filters
Build Effective Filters
Build a New Report
Create a Cross Filter
Enter Filter Criteria
Enter Filter Criteria
Example: Using Row Limits in Report Filters
Getting the Most Out of Filter Logic

Enter Filter Criteria

Field filters are available for reports, list views, workflow rules, and other areas of the application. For each filter, set the field, operator, and value.

Available in: **All** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"
To create custom list views:	"Read" on the type of record included in the list
To create, edit, or delete public list views:	"Manage Public List Views"

1. Choose a field from the first drop-down list.
2. Choose a filter operator.
3. Enter a value in the third field and click **OK**. For picklist fields, click the lookup icon to select a value.
4. Use the **Add** menu to choose the type of filter to add. By default, the **Add** button creates a field filter. When you click on the field filter, you can browse available fields, the first field in the list is the default.

   With tabular, summary, and matrix reports, you can drag a field from the Fields pane to the Filters pane to add a report filter.
5. Optionally, click **Add** > **Filter Logic** to change the default AND relationship between each filter.

If you have Translation Workbench enabled, you can filter on translated strings by specifying the `Filter Language` for filter criteria that use `contains`, `does not contain`, or `starts with` operators.

Tip: To change a report filter, hover over it and click **Edit** or **Remove**. Your filters display when you run your report; click **Edit** on that page to make additional changes.

See Also:

Filter Your Report Data
Filter Operators
Build Effective Filters
Filter Your Report Data

Build Effective Filters

Filters help you hone in on the information you want to find.

Available in: **All** Editions

Add filter logic to change the default AND relationship between each filter.

Warning: If you lose access to a field defined in a filter, Salesforce removes it and displays results based on the remaining filters.

Filtering on Text Fields

- Separate search terms by commas to filter by more than one value. For example, to search for accounts in California, New York, or Washington, use `State contains CA,NY,WA`.
- Filtering isn't case sensitive. For example, searching `State contains ID` returns all matches for "ID", but also returns any instances of "Florida" and "Idaho" because they contain "id" in their names.
- When you filter on standard long text area fields, such as Description or Solution Details, only the first 1000 characters of the field are searched for matches in reports. Reports can't be filtered on custom long text area fields. Only the first 255 characters are shown for custom long text area fields in list views.

Filtering on Date Fields

- If entering a date, use the format allowed by your `Locale` setting. You can also use special date values like TODAY, NEXT WEEK, NEXT YEAR, LAST <number> DAYS, and so on.

Filtering on Numeric Values

- Place quotation marks around numbers or other data that includes commas. For example `Amount equals "10,000"` returns records that have an amount of $10,000 but `Amount equals 10,000` returns $10,000 as well as $10 and $0.
- To search for phone numbers, include the exact phone number formatting or example, `Phone starts with (561).`

Filtering on Picklist Values

- When filtering on multi-select picklist fields, use a semicolon between values to specify an exact match.

  For example, selecting the "equals" operator and a semicolon between two values includes records with both values specified, excluding all other values.
- If your organization uses record types, the lookup dialog lists picklist values for all record types. Use the "equals" or "not equal to" operators for these filters.

  Note: If you change the label for a picklist value that is used as a filter criteria, the picklist value is automatically removed from the filter criteria. For example, if your report contains a filter where `Lead Source equals Email or Web` and you change the picklist value Web to Referral, your report filter will change to `Lead Source equals Email`. If the changed picklist value was the only value specified for a particular filter, it will continue to show up in your filters, but an error will display.

See Also:

Filter Your Report Data
Filter Your Report Data
Enter Filter Criteria
Getting the Most Out of Filter Logic

Filter on Blank Values

Tips on filtering using blank values.

Available in: **All** Editions

- When you use the “less than,” "greater than,” “less or equal,” or “greater or equal” operators on fields that have numeric values, records with blank or “null” values are returned as if their value is zero (0). For example, if you create a workflow rule or a lead assignment rule for accounts with the criteria `Annual Revenue less than 100000`, account records match if their `Annual Revenue` is blank.

  However, records with blank field values are not considered matches in report filters, custom list views, and account assignment rules (which assign accounts to territories).
- To limit results to records that are blank or contain “null” values for a particular field, choose the field and the “equals” or “not equal to” operators, leaving the third field blank. For example, `Amount equals` returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, `Amount equals 1,,2` returns records where the `Amount` is blank or contains the value “1” or “2”.

See Also:

Filter Your Report Data
Build Effective Filters
Enter Filter Criteria

Tips for Filtering by Campaign

Tips on filtering by campaign in list views.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

If your organization uses campaigns, you can restrict list views of contacts or leads by campaign to include only those contacts or leads associated with the campaign.

If you are restricting a list view to a particular campaign:

- You can also filter by campaign member status to include only contacts or leads with a particular status. Select `Campaign: Member Status` from the drop-down list in the first column of the filter criteria. In the second column, use the “equals” or “not equals” operator. Enter one or more status values in the third column. The status values must be valid for your organization.
- You can choose to display the `Campaign: Member Status` column in your list view. This option is found at the bottom of the drop-down list in the `Select Fields to Display` step of creating a list view.

- To filter by campaign member status or add a campaign member status display column, first specify a campaign in the `Filter by Campaign` area.

See Also:

Filter Your Report Data
Build Effective Filters
Enter Filter Criteria

Tips for Filtering on Multiple Currencies

Tips for filtering on currency fields when your organization uses multiple currencies.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

If your organization uses multiple currencies, follow these tips to create more effective filters:

- Use the `Currency` field to find items with a particular currency. For example, `Opportunity Currency equals AUD` finds opportunities with amounts in Australian dollars.
- Prefix currency amounts with a currency code, such as `Annual Revenue greater than USD 50000000`.

  Without the currency code, all amounts are assumed to be in the user's currency. For example, if the user's currency is U.S. dollars, `Annual Revenue greater than 50000000` means 50 million U.S. dollars.

  If the user's currency is invalid, the corporate currency is used.

  From Setup, click **Company Profile** > **Manage Currencies** to obtain the currency codes.
- All amounts are converted to the corporate currency for comparison. For example, `Annual Revenue greater than USD 50000000` finds accounts with revenue greater than 50 million U.S. dollars. This would include an account with revenue of 114 million Australian dollars, which is the equivalent of 60 million U.S. dollars, assuming a conversion rate of 1.9.
- Amounts in reports are shown in their original currencies, and report totals are displayed in your personal currency. You can change the currency used for report totals by clicking **Show** > **Currencies**. For any amount, you can also choose to display the “converted” column (for example, “Annual Revenue (converted)”), which will show amounts in the currency you select from the Display Currencies Using drop-down list.

See Also:

Filter Your Report Data
Build Effective Filters
Enter Filter Criteria

Add Filter Logic

Filter logic lets you specify conditions for your filters using logical operators.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"
To create custom list views:	"Read" on the type of record included in the list
To create, edit, or delete public list views:	"Manage Public List Views"

To change the default AND relationship between each filter:

1. Click **Add** > **Filter Logic**.
2. Enter each filter line number, separated by an operator:

Operator	Definition
AND	Finds records that match both values.
OR	Finds records that match either value.
NOT	Finds records that exclude values.

See Also:

Filter Your Report Data
Build Effective Filters
Enter Filter Criteria

Getting the Most Out of Filter Logic

Filter logic lets you apply Boolean conditions to filters to hone in on the data you're looking for.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

An expression's syntax can affect filtering results.

Example	Description
(1 AND 2) OR 3	Finds records that match both the first two filter lines or the third. Use this expression with the following filter conditions: **1.** Account Owner contains Joe **2.** Industry equals Banking **3.** Annual Revenue greater than 10000000 This filter can help you find banking accounts owned by Joe or any account with a revenue greater than $10 million.

Example	Description
	Tip: You can enter filter line numbers in any order. For example, **3 OR (1 AND 2)** has the same meaning as **(1 AND 2) OR 3**.
1 AND (2 OR 3)	Finds records that match both the first filter line and either of the last two. Using the same filters in the example above, this report finds all accounts Joe owns that are either in the banking industry or have a revenue greater than $10 million. **Tip:** You can repeat a filter line in your expression. For example, **1 AND (2 OR 3)** yields the same results as **(1 AND 2) OR (1 AND 3)**.

Note:

- Filter logic isn't available for all filters. For example, you can't use them for roll-up summary fields.
- You can't use filter logic if your field filters use any of the following fields: `Description`, any `Address Line 1`, `Address Line 2`, `Address Line 3` fields, `Forecast Category`, `Campaign: Member Type`, `User: Profile Name`, `Login Status`, and custom long text area fields. This does not apply to `Filter Logic` on lookup filters.
- On reports where object A may or may not have object B, you can't use the OR condition to filter across multiple objects. For example, if you enter filter criteria `Account Name starts with M OR Contact First Name starts with M`, an error message displays informing you that your filter criteria is incorrect.

See Also:

Filter Your Report Data
Add Filter Logic
Build Effective Filters
Filter Your Report Data
Enter Filter Criteria

Example: Using Row Limits in Report Filters

Here is where you can see a sample of a report filter using a field filter, filter logic, and a row limit.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Say you are a sales executive who wants to see which California accounts currently have the most potential to generate revenue:

1. Click **New Report** from the Reports tab.
2. Open the **Accounts & Contacts** report type, choose **Accounts**, and click **Create**.
3. To find California accounts that either have over $10 million in revenue or are public companies, click **Add** > **Field Filter** and create these filters:
   a. `Billing State/Province equals CA`
   b. `Annual Revenue greater than 10000000`
   c. `Ownership equals Public`
4. To ensure that your results include all California accounts with $10 million in revenue OR that are public, click **Add** > **Filter Logic** and enter `1 AND (2 OR 3)`.
5. To limit the number of results for a tabular report to 10, click **Add** > **Row Limit** and enter 10. Choose your sort field and sort order. Click **OK**.

When you click **Run Report**, your results will contain ten rows and include public companies in California with revenues of more than $10 million.

See Also:

Filter Your Report Data
Filter Choices
Limit Report Results
Getting the Most Out of Filter Logic

Filter Choices

Narrow your report down to the most useful data with field filters, cross filters, and row limits. Use filter logic to control how your filters work together.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Filter the data in a report using the following filter options:

Add Filter Option	Description
Field Filter	Field filters are available for reports, list views, workflow rules, and other areas of the application. For each filter, set the field, operator, and value. With tabular, summary, and matrix reports, you can drag a field from the Fields pane to the Filters pane to add a report filter.

Add Filter Option	Description
Filter Logic	Add Boolean conditions to control how field filters are evaluated. You must add at least one field filter before applying filter logic.
Cross Filter	Filter a report by the child object using WITH or WITHOUT conditions. Add subfilters to further filter by fields on the child object. For example, if you have a cross filter of `Accounts with Opportunities`, click **Add Opportunity Filter** and create the `Opportunity Name equals ACME` subfilter to only include those opportunities.
Row Limit	For tabular reports, select the maximum number of rows to display, then choose a field to sort by and the sort order. You can use a tabular report as the source report for a dashboard table or chart component, if you limit the number of rows it returns.

See Also:

Filter Your Report Data
Filter Your Report Data
Example: Using Multiple Cross Filters
Example: Using WITH in Cross Filters
Example: Using WITHOUT in Cross Filters
Example: Using Row Limits in Report Filters
Getting the Most Out of Filter Logic

Filter Operators

The operator in a filter is like the verb in a sentence. When you choose filter criteria, use an operator to specify the action you want the filter to take.

You can use the following operators when entering filter criteria on list views, reports, dashboards, and some custom fields:

Operator	Uses
equals	Use for an exact match; for example, “Created equals today.”
less than	Use for results that are less than the value you enter; for example, “Quota less than 20k” returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, “Quota greater than 20k” returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.
not equal to	Shows results that don’t have the value you enter. This is especially useful for eliminating empty fields; for example, “Email not equal to <blank>.”
contains	Use for fields that include your search string but might also include other information. For example, “Account contains california” would find California Travel, California Pro Shop, and Surf California. Keep in mind that if you enter a short search string, it may

Operator	Uses
	match on a longer word. For example, “Account contains pro” would find California Pro Shop and Promotions Corporation.
does not contain	Eliminates records that do not contain the value you enter; for example, “Mailing Address Line 2 does not contain P. O. Box.” **Note:** When specifying filter criteria on roll-up summary fields, `does not contain` uses “or” logic on comma-separated values. On list views, reports, and dashboards, `does not contain` uses “and” logic.
starts with	Use when you know what your value starts with, but not the exact text. This is a narrower search term than “contains.” For example, if you enter “Account starts with california” you would find California Travel and California Pro Shop, but not Surf California.
includes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that include one or more of the values you enter. For example, if you enter “Interests includes hockey, football, baseball” you would find records that only have hockey selected as well as those that have two or three of the values entered. Results do not include partial matches of values.
excludes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that do not contain any values that match the ones entered. For example, if you enter “Interests exclude wine, golf” your report lists records that contain any other values from that picklist, including those that are blank. Results do not include partial matches of values.
between	Available for dashboard filters only. Use to filter on ranges of values. For each range, the filter returns results that are greater than or equal to the minimum value and less than the maximum value. For example, if you enter “Number of Employees between 100 and 500,” your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren’t included in the results.
within	Available when you create list views based on a Geolocation custom field. Shows results that are within the specified radius from a fixed latitude and longitude. For example, if you enter “Warehouse location within 50 miles 37.775° –122.418°,” your list view includes all warehouses within a 50–mile radius of San Francisco, California.

See Also:

Filter Your Report Data
Filter Your Report Data
Enter Filter Criteria

Save Your Report

Click **Save** to update an existing report with recent changes, or **Save As** to clone the original report without changing it.

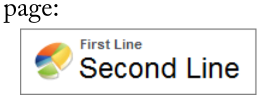
Available in: **All** Editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"
To enter a unique report name used by theAPI:	"Customize Application"
To select a folder to store public reports:	"Manage Public Reports"

1. Verify the name, description, and folder, then choose where to go next:
   - Click **Save** to save the report and go to the Reports home page
   - Click **Save & Return to Report** to save it and go back to the report run page.

   Note: To save your report at a specific role hierarchy drill-down level on sales, forecast, opportunity, and activity reports, select `Save Hierarchy Level`.

Tip: If you add a colon to your report name, it displays in two separate lines when you view the report. Use this to categorize reports by name, or better display long names. For example, if you enter `First Line: Second Line` for `Report Name`, you'll see this on the run page:



See Also:

Build a New Report
Filter Your Report Data

Build a Report From a Template

Salesforce provides a rich collection of standard report types that you can tailor to your unique requirements. You rarely need to create a brand-new report.

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

User Permissions Needed	
To run reports:	"Run Reports"
To create, edit, and delete reports:	"Create and Customize Reports"

Note: You may not see some of these folders if your administrator has customized the visibility of the Report tab folders.

If you can't find a report to customize for your own needs, you can also create a new custom report to access exactly the right information.

See Also:

Get the Right Data into Your Report
Account and Contact Reports
Activity Reports
Administrative Reports
Campaign Reports
Salesforce CRM Content Reports
Forecast Reports
Lead Reports
Opportunities Reports
Product and Asset Reports
Self-Service Reports
Support Reports
Territory Reports
The Report Run Page
Activity Reports
Creating a Custom Report
Forecast Reports
Gather Data with Reports
Opportunity Reports

Account and Contact Reports

Use account and contact reports to learn about active, neglected, or new accounts, as well as accounts by account owner or partner. The two standard contact reports let you create a mailing list of contacts or track opportunities by contact role.

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

Special Features of Account and Contact Reports

Consider the following when running account and contact reports:

Standard Reports

- If your organization tracks field history on accounts or contacts, you can report on that information using the account history or contact history report.
- If your organization uses person accounts, fields specific to person accounts are available and prefixed with `Person Account:` in account reports. In addition, you can include the `Is Person Account` field in both account and contact reports. Note that your administrator may have renamed `Person Account` to another term, which will display here.

Tips for Account and Contact Reports

- You can also create a report of your contact information, export that data to Excel, and then do a mass mail merge using Microsoft® Word.
- The `Last Activity` of an account and contact is the most recent due date of an activity on the record. The following past or future activities set this date: Any event and closed tasks. Since activities roll up through associated records, the `Last Activity` date on an account can be an activity on a contact, opportunity, or other associated record.
- The standard `View` filter for account reports allows you to limit your account data according to the following options. These options vary depending on your organization's edition and setup.
  - ◊ My accounts—Shows accounts that you own.
  - ◊ My account team accounts—Shows accounts where you are on the account team.
  - ◊ My account team and my accounts—Shows accounts you own and those where you are on the account team.
  - ◊ My team's accounts—Shows your accounts and accounts owned by all of your subordinates in the role hierarchy.
  - ◊ My territories—For organizations that use territory management, this option shows accounts that belong to the territories to which you are assigned.
  - ◊ My territory team's accounts—For organizations that use territory management, this option shows accounts that belong to your territories and your territories' descendants.
  - ◊ My team's account team and their own accounts—For users who report to you in the role hierarchy, shows accounts they own or for which they are on the account team.
  - ◊ All visible accounts—Shows all accounts that you can view, as determined by your sharing model.
  - ◊ Territories—For organizations that use territory management, the additional `Territories` filter can be set to All, Multiple Territories, or Missing Territory. In custom report types, when using the `Territories` filter that includes territories, Multiple Territories or Missing Territories are not shown in the report results.
  - ◊ If your organization uses a Salesforce Customer Portal, add the `Customer Portal Account` field to your account reports to view which accounts have contacts enabled to use the portal.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Activity Reports

Activity reports are useful for gathering information about open activities, completed activities, multi-person events, or pending approval requests for which you are a delegated approver.

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

Standard activity reports allow you to select the date range and status of the activities you want included. The standard activity reports list your tasks and appointments for a selected date range or events with all invitees.

You can also create custom reports for activities by clicking the Reports tab, **New Report**, and choosing **Activities** as the type of data on which to report.

Special Features of Activity Reports

Consider the following when running activity reports:

Standard Reports

- Choose the HTML Email Status report if you have the HTML email tracking enabled. This reports on anything in the HTML Email Status related list of your leads and contacts.
- Choose the Events with Invitees report to include only multi-person events in your report. The standard filters for events with invitees are:
  - ◊ Assigned to...—Shows only multi-person events that you own.
  - ◊ Assigned to the team of...—Shows multi-person events that anyone in your team owns.
  - ◊ Invitee is...—Shows only multi-person events that list you as an invitee.
  - ◊ Invitee is in the team of...—Shows the multi-person events that show anyone on your team as an invitee.
- The My Delegated Approval Requests report lists all the approval requests for which you are the approval proxy. Note that the All Pending Approval Requests report is listed in the Activity Reports folder.
- In Professional, Enterprise, Unlimited, and Developer Edition organizations, to show the activities for users who report to you, use the **Hierarchy** links in the Tasks and Appointments report. Note that you can view only your own activities and activities owned by users below you in the role hierarchy.

Report Types

- Using report builder, you can create activity reports that show activities related to another type of record. For example, a custom Activities with Leads report shows activities associated with leads.
- Activities with Leads reports do not display data for the `Address Line 1`, `Address Line 2`, and `Address Line 3` fields.

Tips for Activity Reports

- Set a search criteria of “Event Invitation equals 0” to filter out events that are meeting invites sent to users for a multi-person event.
- Archived activities are not included in reports. Events and closed tasks older than a year are archived. However, open tasks are not archived. You can still see archived activities for a record by clicking **View All** in the `Activity History` section of a record's detail.
- Activities for private contacts only show up in reports for the contact owner.
- The standard filters for activity reports allow you to limit your report results using the following options. Some of these options will not be visible depending on your edition.
  - ◊ My Activities—Shows activities that you own.
  - ◊ My Delegated Activities—Shows activities that you created but are owned by someone else in the same role as you, and below your role, in the role hierarchy.
  - ◊ My Team's Activities—Shows activities owned by users who report to you in the role hierarchy.
  - ◊ All Activities—Shows all activities that you can view, as determined by your sharing model.

- If you receive an error message that your activity report has too many results, customize the report to include a filter on a picklist, text, or date field. Alternatively, rerun the report using a different activity data type such as "Activities with Accounts" or "Activities with Opportunities."

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Administrative Reports

Administrative reports help you analyze your Salesforce users, documents, and pending approval requests. You can report on the active Salesforce users and see who has been logging in.

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To view the Administrative Reports folder:	"View Setup and Configuration"
To run user reports:	"Run Reports" AND "View Setup and Configuration"
To create, edit, save, and delete user reports:	"Create and Customize Reports" AND "View Setup and Configuration"
To run document reports:	"Run Reports"
To create, edit, save, and delete document reports:	"Create and Customize Reports"
To run pending approval request reports:	"Run Reports" AND "View All Data"

Note: You can see the Administrative Reports folder on the Reports tab only if you have the "View Setup and Configuration" permission. You don't need this permission to view the Administrative Reports report type—all users can view it and manage any document reports associated with that type. To view other types of reports associated with that type, such as user and approval request reports, you must have the permission.

Special Features of Administrative Reports

Consider the following when running administrative reports:

Standard Reports

- The All Active Users report lists the active users in your organization and when they last logged in.
- The Users Logged in This Week report lists all of the users who have logged in to Salesforce in the past seven days.
- The Documents report lists the documents within each document folder.
- The All Pending Approval Requests report lists the approval requests awaiting approval for each approval process. Note that the My Delegated Approval Requests report is listed in the Activity Reports folder.
- If your organization uses territories, the User Territory Report in the Territory Reports folder summarizes the territories to which users have been assigned.

Report Types

- Create a custom report that lists your organization’s reports and the last time each report was used. Choose Administrative Reports and select Reports as the report type.
- If your organization uses a Salesforce Customer Portal, you can report on Customer Portal users:

  1. Create a custom report.
  2. Choose Administrative Reports.
  3. Select Users as the report type.
  4. Add `License Type`, `Profile`, and `Role` to your report columns. You can’t report on roles for high-volume portal users because they don’t have roles.

  Note: Permission sets aren't supported.

  You can also add the `Customer Portal Account` field to your account reports to view which accounts have contacts enabled to use the portal.
- You can create custom report types from which users can report on your organization's reports and dashboards. When defining a custom report type, select Reports or Dashboards from the `Primary Object` drop-down list on the New Custom Report Type page.

Tips for Administrative Reports

- Users with the “Manage Users” permission can create a custom user report that lists the details of users' login attempts. The relevant fields—such as `Login Date/Time`, `Source IP Address`, and `Login Status`—are grouped in the Login History section of the Select Columns step. Note that the `Client Type` field shows whether the user logged in via a Web browser or an alternate interface such as Connect for Lotus Notes or a partner portal. You can also see which users have never logged in by setting report criteria: choose the `Login Date/Time` field and the “equals” operator and leave the third value blank.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Campaign Reports

Use campaign reports to analyze your marketing efforts. You can report on the ROI of your campaigns, track who you targeted with your campaigns and who has responded, or analyze which opportunities resulted from your campaigns.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Special Features of Campaign Reports

Consider the following when running Campaign Reports:

Standard Reports

- On the Campaign Detail custom report and the Campaign ROI Analysis report, you can include campaign-hierarchy statistics that provide aggregate values for a parent campaign and all the campaigns below it in the campaign hierarchy. If your campaigns include a custom picklist that indicates hierarchy level (for example, "tactic," "program," and "initiative"), you can run a report that summarizes data at any hierarchy level across all campaigns.
- Use the Campaign Leads or Campaign Contacts reports to list the leads or contacts associated with your campaigns.
- Use the Campaign Member Report for a list of campaign members by campaign.
- Use the Campaign Member Analysis report to summarize information about who has responded to campaigns.
- Use the Campaign Revenue Report to analyze which opportunities have resulted from your campaigns. In Enterprise, Unlimited, and Developer Editions, you can also analyze products, quantity schedules, and revenue schedules in this report.
- The Campaign ROI Analysis Report calculates the return on investment (ROI) and average costs for your campaigns. The ROI is calculated as the net gain (`Total Value Won Opps` - `Actual Cost`) divided by the `Actual Cost`. The ROI result is expressed as a percentage.
- Use the Campaigns with Influenced Opportunities report to view opportunities that have been influenced by multiple campaigns.

  Note: The Campaigns with Influenced Opportunities report respects sharing rules on accounts, contacts, and campaigns. Objects with sharing rules set to private will not display in the report.

Report Types

- Use the Campaigns with Campaign Members custom report type to create a report that contains information about the leads and contacts on multiple campaigns. Use the Campaign Call Down report to see contacts and leads for a specific campaign. These reports are only available to users that have the "Read" permission on both contacts and leads.
- Use the Campaigns with Leads and Converted Lead Information report to view lead lifetime information sorted by a campaign or campaigns.
- Use the Campaigns with Influenced Opportunities report to view opportunities that have been influenced by multiple campaigns.

Tips for Campaign Reports

- Some reports allow you to limit the data to one campaign by using the lookup icon to select a campaign. If the user running a report no longer has access to view the selected campaign, the report does not show any results. This report behavior is similar to what happens when a campaign is deleted.
- `Member Status` is the status of a lead or contact in reference to the campaign. The campaign owner can create up to 50 member status values. Sample Member Status values include, "Planned," "Sent," or "Attended." Additionally,

you can now add the `Member First Associated`, `Responded`, and `Member First Responded` fields to campaign reports. These fields allow you to see the date the member was added to the campaign, whether the member responded to the campaign, and the date the member initially responded to the campaign.

- The `Last Activity` of a campaign is the most recent due date of an activity on the record. The following past or future activities set this date:
  - ◊ Any event
  - ◊ Closed tasks

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Salesforce CRM Content Reports

Use CRM Content reports are available to analyze Salesforce CRM Content data. Find out such things as what is in each library, how much storage each library uses, or which files and content packs are downloaded most.

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Special Features of Salesforce CRM Content Reports

Standard Reports

- Use the Library Content report to view the number of files, content packs, Google docs, and Web links in each library as well as the total amount of file storage used by each library.
- Use the Content Publication Time Frame report to determine how many files, content packs, Google docs, and Web links were published in a library during a given time period.
- Use the Library Administrators report to determine which users have administrative rights in the library. A library administrator is a user who has the `Manage Content` option checked in his or her library permission.
- Use the Most Content Downloads report to determine which files and content packs are downloaded most frequently and which Web links and Google docs are opened most frequently.
- Use the Most Content Subscriptions report to determine which files, content packs, Google docs, and Web links have the most subscribers.
- Use the Stale Content report to determine which files have not been downloaded or revised recently.
- Use the Content Authors report to view how many files, content packs, Google docs, and Web links each author has published in Salesforce CRM Content.

Report Types

Use the Salesforce CRM Content report type to analyze data from standard and custom fields in your Salesforce CRM Content library. The Salesforce CRM Content report type offers two custom reports:

Content Report

This report type allows you to analyze and sort by any of the content report fields.

Library and User Report

This report type generates a list of users who are assigned to libraries.

Tips for Content Reports

- Salesforce CRM Content users who have the `Manage Content` option checked in their library permission can sort report data by the library they have access to ("My Libraries") or by all the libraries in an organization ("All Libraries"). Users without the `Manage Content` option can only sort data by the libraries they have access to.
- Sort custom reports by `Library Name` to view data for individual files as well as library summaries, such as total storage used and total number of downloads.
- Sort according to the `Content ID` to view data for a particular document.
- If you have Customer Portal or partner portal users with the "Create Libraries" user permission, run the Library Administrators report to determine which new libraries have been created by portal users.

Content Report Fields

You can report on any of the following fields in Content custom reports. Depending on the report, these fields are also available in standard reports.

Field	Description
`Archived`	Flag that indicates whether a file has been archived. Archiving a file removes it from its library but does not permanently delete the file from Salesforce CRM Content. Archived files can be restored as needed.
`Content Created By`	Contributor who published the file, content pack, Google doc, or Web link.
`Content ID`	Identifier that enables you to group by file rather than version. The `Content Title` is not guaranteed to be unique because multiple versions of the same file can have different titles.
`Content Published Date`	Date a file, content pack, Google doc, or Web link was first published.
`Content Title`	Title of a file, content pack, Google doc, or Web link.
`Content Type`	Title of the content type associated with the file, content pack, Google doc, or Web link.
`Featured Content`	Flag that indicates whether a piece of content is featured.
`Individual Content Size (MB)`	Size of an individual file, exclusive of other versions of the same file.
`Last Subscribed Date`	Date on which the content was subscribed to most recently.
`Num Downloads`	Number of times a file has been downloaded or the total number of downloads in a library. The number of times a Google doc or Web link has been opened is also included in this count. **Tip:** To see which users have downloaded a certain file, go to the file's content details page and click the Downloads tab.
`Num Negative Ratings`	Number of thumbs-down votes.
`Num Positive Ratings`	Number of thumbs-up votes.

Field	Description
`Num Subscriptions`	Number of users who are subscribed to a file, content pack, Google doc, or Web link, or the total number of subscriptions in a library.
`Num Versions`	Number of times a new version of a file has been published.
`Overall Rating`	The number of positive votes minus the number of negative votes. For example, if a file has two positive votes and no negative votes, its `Overall Rating` is 2.
`Tag`	Salesforce CRM Content tag assigned to a file, content pack, Google doc, or Web link.
`Total Content Size (MB)`	Size of a file, inclusive of all the file's versions.
`Version Revised Date`	Date and time a new version of the file was published.
`Version Revised By`	Contributor who published the file version.
`Library Name`	Name of the library.
`Library Created Date`	Date and time the library was created.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Forecast Reports

Forecast reports give you information about your customizable forecast data.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Note: If you don't see the Forecast Reports folder, your organization may not have customizable forecasting enabled. Report builder doesn't support Customizable Forecasts.

Special Features of Customizable Forecast Reports

Consider the following when running customizable forecast reports:

Standard Reports

Create a forecast history report if you want the report to include information about forecasts you already submitted. Select `All Forecasts` to show the state of the forecasts after each update. Choose `Latest Forecasts` to display only the current state of the forecasts.

Report Types

- When creating a custom forecast report, choose the **Customizable Forecast: Opportunity Forecasts** report type if you want to include information about the opportunities that contribute to your forecast.

- You can include custom user fields in custom opportunity forecast reports as columns and as column values. Custom user fields are available as either opportunity owner or account owner custom information. The custom field label will be used for both opportunity owner or account owner information, which can cause confusion if they are both on the same report and have similar field labels.
- If you have the "View All Forecasts" permission, forecast summary and forecast history reports include all users' data for the chosen forecast hierarchy, including users in branches of the forecast hierarchy that have no forecast manager.

Tips on Customizable Forecasting Reports

- You must specify a reporting interval by fiscal year or by date.
- Forecast reports include private opportunities.
- Opportunity amounts are included in forecast reports if the opportunity is set to close within the forecast period.
- Forecast reports include only opportunities that are set to close within the forecast period, except those assigned to the Omitted forecast category.
- Create a forecast summary report if you want to view information about the amounts in your forecast without details of the opportunities that contribute to that amount.
- If your organization uses territories, you can create custom forecast reports that summarize information by territory name.
- You can view an opportunity forecast report based on the forecast hierarchy by drilling down in your forecast hierarchy.

  1. Select the desired role or territory from the **Hierarchy** links.
  2. Choose the appropriate forecast users or teams from the **Show Opportunities Owned By** or **Show Forecasts Owned By** scopes at the top of the report.
  3. Click **Run Report** again to refresh the report data for your chosen parameters.

  For example, to see your opportunity information, including your overrides on opportunity amounts or quantities and overrides from users below you in the forecast hierarchy, set the **Hierarchy** link to your forecast role. To see the opportunity information of someone beneath you in the forecasting hierarchy, drill down into that role.

  Warning: The My Team view shows forecasts across multiple hierarchy levels. Consequently, values may be included in a subordinate's forecast total and a forecast manager's forecast total. This may lead to larger than expected values in the column total because subordinate amounts are included multiple times in the total.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Lead Reports

Use lead reports to show information about the source and status of leads, how long it takes to respond to leads, neglected leads, and the history of lead fields.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Special Features of Lead Reports

Consider the following when running lead reports:

Standard Reports

Choose the Lead History report type to track the history of standard and custom fields on leads where field histories are set to tracked. Use this report to see tracked fields' old and new values.

Tip: If you have the “Create and Customize Reports” permission, you can use the `View` drop-down on a Lead History Report to view lead history data by My Leads, My Team's Leads, User Owned Leads, Queue Owned Leads, and All Leads.

Tips for Lead Reports

- Limit your report view to “My team’s leads” to see leads owned by users who report to you in the role hierarchy.
- Lead reports can show all leads, both converted and unconverted. To limit your report to just unconverted leads, enter filter criteria of “Converted equals 0.”
- The `Last Activity` of a lead is the most recent due date of an activity on the record. The following past or future activities set this date:
  - ◊ Any event
  - ◊ Closed tasks
- You can create a report of your lead information, export that data to Excel, and then do a mass mail merge using Microsoft® Word.

Lead Report Limitations

- You can't use filter conditions to search the results of the `Old Value` and `New Value` fields.
- You can’t use filter logic if you are filtering by `Field/Event`.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Opportunities Reports

View standard information about your opportunities, including owners, accounts, stages, amounts, and more. The default settings show you the most commonly used information from each object, but you can customize the report to view other information, such as primary campaign source, forecast category, and synced quote.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Tabular

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name` • `Amount` • `Close Date` • `Stage` • `Age` • `Type` • `Probability (%)` • `Lead Source` • `Fiscal Period` • `Next Step` • `Created Date`
Opportunity Owner Information	• `Opportunity Owner` • `Owner Role`

Object Information Type	Columns
Account Information	• `Account Name`

See Also:

Build a Report From a Template
Opportunity Reports
Opportunities with Competitors Report
Opportunities with Contact Roles and Products Report
Opportunities with Contact Roles Report
Opportunities with Partners Report
Opportunities with Products Report
Opportunities with Quotes and Quote Line Items Report
Opportunities with Quotes and Quote PDFs Report
Opportunities with Opportunity Teams and Products Report
Opportunities with Opportunity Teams Report
Opportunity Field History Report
Opportunity History Report
Opportunity Trends Report
Create a Custom Opportunity Report
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunity Reports

Opportunity reports provide information about your opportunities, including owners, accounts, stages, amounts, and more. The default settings show you the most commonly used information from each object, but you can customize a report to view other information, such as primary campaign source, forecast category, and synced quote.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

If your organization uses Forecasts or Customizable Forecasts, you'll see forecast report options paired with opportunity report options in the standard reports folders and the custom reports wizard. Opportunities owned by users who do not have a role in your organization's hierarchy are omitted from opportunity, forecast, and sales reports. This restriction does not apply to

Personal or Group Edition organizations, which do not have a role hierarchy. For reports that include the `Partner` column (except for the Partner Opportunities report), only the primary partner of the opportunity is displayed.

See Also:

Opportunities Reports
Tips for Working with Opportunity Reports
Use Standard Opportunity Reports
The Report Run Page
Limit Report Results
Build a Report From a Template

Tips for Working with Opportunity Reports

Opportunity reports can include all opportunity fields plus some extra columns for additional detail.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

- You can use the following columns to provide additional detail:
  - ◊ `Age`—For an open opportunity, the number of days since the opportunity was created. For a closed opportunity, the number of days between the creation date and the closed date.
  - ◊ `Stage Duration`—The number of days the opportunity was in the stage listed in the `Stage` column. You can run the Opportunity Stage Duration report to see how much time an opportunity spent at different stages.
  - ◊ `Last Activity`—The most recent due date of an activity on the opportunity record, including any opportunity event or closed task.
- Not all Opportunity Product fields are available in report filters. For example, the `Product Family` field is not available in Opportunity Product report filters because it is related to that object through the Pricebook Entry object. To make the `Product Family` field available in Opportunity Product report filters—for cross-sell or upsell reporting—create a custom formula field to store its contents and use that formula field in your filter. Click ***`Your Name`*** > **Customize** > **Opportunities** > **Opportunity Products** > **Fields** and create a custom field of type Formula, making sure to use `Text` for your formula return type and `TEXT(PricebookEntry.Product2.Family)` for your formula.
- In Professional, Enterprise, Unlimited, and Developer edition organizations, the **Hierarchy** links let you browse report results based on the role or territory hierarchies.
- If your organization uses territory management, the Hierarchy filter on opportunity reports lets you view data according to either the role or territory hierarchies. In addition, the Territories filter lets you display either opportunities from all territories or opportunities that lack an associated territory.
- You can include the `Primary Campaign Source` field on all standard opportunity reports. This field is controlled by field-level security.
- Use the View filter to limit your opportunity report results. View options vary depending on your organization's Edition and setup.
  - ◊ My opportunities—Shows only your opportunities.
  - ◊ My team-selling opportunities—Shows opportunities for which you are on the opportunity team.
  - ◊ My team-selling and my opportunities—Shows your opportunities and opportunities for which you are on the opportunity team.
  - ◊ My team's opportunities—Shows your opportunities and opportunities owned by all of your subordinates in the role hierarchy.

If your organization uses territory management, the effect of this option depends on the value of the Hierarchy filter above. If you select `Role`, you see your opportunities and opportunities owned by all of your subordinates in the role hierarchy. If you select `Territory`, you see opportunities that you own and any opportunities owned by your territories' descendants.

- My team's team-selling and their opportunities—For users who report to you in the role hierarchy, shows opportunities they own or for which they are on the opportunity team.
- My territories—For organizations that use territory management, this option shows opportunities that belong to the territories to which you are assigned.
- All opportunities—Shows all opportunities you can view.

See Also:

Opportunity Reports
Opportunity Reports
Create a Custom Opportunity Report
Use Standard Opportunity Reports

Use Standard Opportunity Reports

Using the standard opportunity reports, you can report on your opportunity pipeline and history, opportunity sources, opportunity types, and more.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To run reports:	“Run Reports”
To schedule reports:	“Schedule Reports”
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

1. In the `Folders` pane on the Reports tab, select **Opportunity Reports**.
2. Click the report you want.

Report Name	Description
Closed Opportunities	Won opportunities
Opportunities by Type	Types of available opportunities.
Opportunity Field History	Field history on opportunities. Available only if your organization tracks this information.
Opportunity History	Status changes on opportunities. Available only if your organization tracks this information.

Report Name	Description
Opportunity Pipeline Trend	A historical snapshot of your opportunities; opportunity amounts are grouped by historical stage for specified months. This report is available in Professional, Enterprise, Unlimited, and Developer Edition organizations only.
Opportunity Pipeline	Opportunities by stage.
Opportunity Pipeline with Splits	Opportunities summarized by split information such as assigned user and percentage.
Opportunity Product	Opportunities by month and product.
Opportunity Product Report with Splits	Split assignments and percentages for each product. You can also summarize information by these fields: • `Split Total Price`–Split percentage multiplied by Total Price. • `Split Expected Product Amount`–Split Total Price multiplied by Probability.
Opportunity Schedule Report with Splits	Opportunities by month, including split percentages for the opportunity team. To access this report, product scheduling must be enabled for your organization. You can also summarize information by these fields: • `Split Total Price`–Split percentage multiplied by Total Price. • `Split Schedule Amount`–Split percentage multiplied by Schedule Amount. • `Split Expected Product Amount`–Split Total Price multiplied by Probability. • `Split Expected Schedule Amount`–Split Schedule Amount multiplied by Probability.
Opportunity Sources	Sources of your opportunities.
Opportunity Stage Duration	Duration of an opportunity at each stage.
Opportunity Teams	Information about opportunities and opportunity teams to which you belong.
Partner Opportunities	All partners associated with an opportunity or the primary partners only. To limit your results to primary partners, customize the report and enter `Primary equals True` on the criteria page of the report wizard.
Stuck Opportunities	Open opportunities grouped by stage and then sorted by age.

3. Run the report.

See Also:

Opportunity Reports
Opportunity Reports
Create a Custom Opportunity Report
Tips for Working with Opportunity Reports

Opportunities with Competitors Report

View information about your company's competitors for opportunities, including their strengths and weaknesses.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Summary

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name` • `Close Date` • `Amount`
Competitor Information	• `Competitor Name` • `Strengths` • `Weaknesses`
Account: General Information	• `Account Name`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports

Opportunities with Contact Roles and Products Report

View information about the contacts and opportunities associated with a selected product. You must select a product to filter results by when you run the report.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Tabular

Selected Columns

Object Information Type	Columns
Opportunity: Information	• `Opportunity Name`
Product Information	• `Product Name`
Opportunity Owner Information	• `Opportunity Owner`
Account: General Information	• `Account Name`
Contact Role: General	• `Title` • `First Name` • `Last Name`
Contact Role: Phone/Fax/Email	• `Phone` • `Email`
Contact Role: Address	• `Mailing Street` • `Mailing City` • `Mailing State/Province` • `Mailing ZIP/Postal Code`

Object Information Type	Columns
	• `Mailing Country`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Contact Roles Report

View information about the contacts associated with your opportunities, including name, title, and role.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format
Tabular

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name`
Opportunity Owner Information	• `Opportunity Owner`
Account: General Information	• `Account Name`
Contact Role: General Information	• `Title` • `First Name` • `Last Name`
Contact Role: Phone/Fax/Email	• `Phone` • `Email`
Contact Role: Address	• `Mailing Street` • `Mailing City` • `Mailing State/Province`

Object Information Type	Columns
	• Mailing ZIP/Postal Code • Mailing Country

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Partners Report

View information about the partners you team with on your opportunities, including opportunity name, amount, and partner role.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Summary

Selected Columns

Object Information Type	Columns
Opportunity Information	• Opportunity Name • Close Date • Amount
Opportunity Owner Information	• Opportunity Owner
Partner Information	• Partner Owner • Partner Role • Partner
Account Information	• Account Owner

Object Information Type	Columns
	• Account Name

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Products Report

View information about the products associated with your opportunities, including product name and opportunity stage.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Matrix

Summary Fields

`Total Price` (sum)

Selected Columns

Object Information Type	Columns
Opportunity Information	• Opportunity Name • Amount • Close Date • Stage • Age • Type • Probability • Created Date
Product Information	• Product Name • Product Code • Quantity • Active Product

Object Information Type	Columns
	• Sales Price • Product Date • Product Description • Total Price • Product: Month • List Price
Opportunity Owner Information	• Opportunity Owner • Owner Role
Account: General Information	• Account Name

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Quotes and Quote Line Items Report

View details about the quotes associated with opportunities, and the line items for each quote. The default settings provide the most commonly used information from each object, but you can customize the report to see any opportunity, quote, or quote line item field.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

If your organization uses multicurrency or advanced currency management, you have additional options for customizing this report. When you select report columns, you can select the "converted" version of an amount or total column to show its value converted to a different currency. Select the currency you want to convert to under Advanced Settings when you select your report criteria.

The default settings for this report are:

Format

Summary

Summary Fields

`Amount` (sum)

`Quote Discount` (sum)

Groupings

The default report shows you results grouped first by `Opportunity Name` and then by `Quote Name`. Each quote line item is listed beneath its associated quote.

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name` • `Amount`
Quote Information	• `Quote Name` • `Discount` • `Syncing` • `Status`
Quote Line Item Information	• `Quote Line Item: Discount` • `Product: Product Name` • `Line Item Number` • `Sales Price` • `List Price` • `Quote Line Item: Subtotal` • `Quote Line Item: Total Price`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Quotes and Quote PDFs Report

View details about the quote PDFs created for each quote associated to an opportunity. The default settings show you the most commonly used information from each object, but you can customize the report to view other information, such as who created or last modified each listed quote PDF.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Summary

Grouping

The default report shows quotes and quote PDFs grouped by `Opportunity Name`.

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name`
Quote Information	• `Quote Name` • `Syncing`
Quote PDF Information	• `Quote PDF: Created Date` • `Quote PDF: Name` • `Quote PDF: Discount` • `Quote PDF: Grand Total`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Opportunity Teams and Products Report

View information about your opportunity team members and their products, organized by opportunity. You must specify either a product or an opportunity team member to filter results by when you run the report.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Tabular

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name`
Product Information	• `Product Name`
Team Member Information	• `Team Member Name` • `Team Role`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunities with Opportunity Teams Report

View information about the members of your opportunity team and their roles, organized by opportunity.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Note: You must enable and set up team selling to use the Opportunities with Opportunity Teams report.

The default settings for this report are:

Format
Tabular

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name`
Team Member Information	• `Team Member Name` • `Team Role`

Note: If your administrator has created custom opportunity team fields, they can be included in the Opportunity with Opportunity Teams Report.

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunity Field History Report

View information about the change history of key opportunity fields, including old and new values and the dates edits were made.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Note: You must enable and set up field history tracking and select fields in order to use the Field History Tracking report.

The default settings for this report are:

Format
Tabular

Selected Columns

Object Information Type	Columns
History Data	• `Edit Date` • `New Value` • `Edited By` • `Field/Event` • `Old Value`
Opportunity Fields	• `Opportunity Name`

Object Information Type	Columns
Opportunity Owner Information	• `Opportunity Owner`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunity History Report

View information about the history of your opportunities, including stages and close date.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format

Summary

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name`
Opportunity Owner Information	• `Owner`
Opportunity History Information	• `From Stage` • `Amount` • `Last Modified` • `To Stage` • `Probability (%)` • `Last Modified By`

Object Information Type	Columns
	• `Close Date`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Opportunity Trends Report

View information about trends shared by the opportunities in your pipeline.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

The default settings for this report are:

Format
Matrix

Groupings
The default report shows rows grouped by `Historical Stage` and columns grouped by `As of Date`.

Summary Fields
`Historical Amount` (sum)

Selected Columns

Object Information Type	Columns
Opportunity Information	• `Opportunity Name`
Opportunity Trend Information	• `Historical Amount` • `As of Date` • `Historical Stage`

Object Information Type	Columns
Opportunity Owner Information	• `Opportunity Owner Alias`

See Also:

Opportunities Reports
The Report Run Page
Limit Report Results
Opportunity Reports
Build a Report From a Template

Create a Custom Opportunity Report

You can create and run custom opportunity reports to include information from associated objects, such as products, partners, and quotes.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To run reports:	"Run Reports"
To schedule reports:	"Schedule Reports"
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. On the Reports tab, click `New Report`.
2. Select the report type from the **Opportunities** folder.

    - Opportunities Reports
    - Opportunities with Products Report
    - Opportunities with Contact Roles Report
    - Opportunities with Partners Report
    - Opportunities with Competitors Report
    - Opportunities with Opportunity Teams Report
    - Opportunity History Report
    - Opportunity Field History Report
    - Opportunity Trends Report
    - Opportunities with Contact Roles and Products Report
    - Opportunities with Opportunity Teams and Products Report

- Opportunities with Quotes and Quote PDFs Report
- Opportunities with Quotes and Quote Line Items Report

3. Click **Create**.
4. Select the report's format and columns, and define any filters you want to use.
5. Run the report.

See Also:

Opportunities Reports
Opportunity Reports
Use Standard Opportunity Reports
Tips for Working with Opportunity Reports

Product and Asset Reports

Use product and asset reports to view information about the products your users currently have installed. Find out what assets your customers have, list the cases filed for a particular asset, or identify assets that aren't associated with a product.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Special Features of Product and Asset Reports

Consider the following when running product and asset reports:

Standard Reports

Use the Assets without Products report, available from the "Products and Asset Reports" folder to list the assets that are not associated with a product. Depending on how you use assets, these assets can represent your competitor's products.

Report Types

- To create a custom report showing what assets your customers have, click **New Report** from the Reports tab and choose the Accounts with Assets or Contacts with Assets report type from the Accounts & Contacts report type category.
- To view a list of the cases filed for a particular asset, click **New Report** from the Reports tab and choose the Assets with Cases report type from the Price Books, Products and Assets option.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Self-Service Reports

Self-Service reports help you analyze the effectiveness of your Self-Service portal. Find out how many cases are being viewed, how many customers are logging in, or what customers think of the solutions you're offering.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Note: Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

Standard Reports

- The Self-Service Usage Report gives you information on how many cases are viewed and logged, the number of comments that have been added, and the number of searches Self-Service users have performed.
- The Self-Service User Report provides information about the customers who are logging into your Self-Service portal, including the associated account and last login date. You can also include Self-Service fields in any custom contact report.
- The Helpful Solutions report displays statistics from Self-Service portals that display solutions. On each Self-Service solution page, customers can indicate whether the solution is helpful. You can use the results of this survey when choosing the top five solutions for your Self-Service Home page and to verify that customers are able to find the solutions they need.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Support Reports

Use support reports to track the number of cases created, case comments, case emails, case owners, case contact roles, cases with solutions, the length of time since the case last changed status or owner, and the history of case fields.

Available in: **All** Editions except **Database.com** (The edition determines which reports you see.)

You can also report on the solutions for your organization, including solution history, the languages in which solutions have been written, and whether translated solutions are out of date. If you have enabled the Self-Service portal, you can run reports to track usage of your Self-Service portal.

Special Features of Support Reports

Consider the following when running support reports:

Standard Reports

- Choose the Translated Solutions report to summarize the translated solutions associated with each master solution.

- Choose the Contact Role report to show all cases with their associated contact roles.
- Choose the Cases with Articles report to see the articles attached to cases. This report is only available if Salesforce Knowledge is enabled.

  The report displays articles even if they're not marked as available for the internal app channel.

Report Types

- You can create a custom report to view a list of cases with milestones by choosing the Cases with Milestones report type. This report type is only available if entitlements is enabled.
- Choose the Case History and Solution History report types to track the history of standard and custom fields on cases and solutions where field histories are set up for tracking. Use these reports to see tracked fields' old and new values. You can't use filter conditions to search the results of the `Old Value` and `New Value` fields.
- You can create a custom report to view a list of both inbound and outbound emails by case by choosing the Cases and Emails report type. This type of report is only available to organizations with Email-to-Case or On-Demand Email-to-Case enabled.
- You can run case lifecycle reports to view the results of the `Range` field, which indicates the length of time since the case last changed status or owner. Each time the status or owner changes, the counter begins again at zero.

Custom Report Types

Use custom report types to define report criteria from which users can run and create reports on entitlements, service contracts, and contract line items. After entitlement management is enabled, Salesforce automatically includes the following custom report types:

Custom Report Type	Description	Report Type Location
Accounts with entitlements with contacts	Lists accounts with entitlements that include contacts (named callers).	Accounts & Contacts
Service contracts with contract line items	Lists service contracts with contract line items (products).	Customer Support Reports
Service contracts with entitlements	Lists service contracts with entitlements.	Customer Support Reports

Tips for Support Reports

- You can choose to view the `Age` of a case in days, hours, or minutes. The age of an open case is the elapsed time from creation to the present. The age of a closed case is the elapsed time from creation to the closing time of the case. Note that the age of a case does *not* take into account any holidays that are associated with the case's business hours. Holidays suspend business hours during specified dates and times. .
- You can limit any case report to cases owned by users or cases in queues. Choose User Owned Cases or Queue Owned Cases from the View drop-down at the top of a case report.
- You can create a case report containing contact email addresses, export that data to Excel, and then do a mass mail merge using Microsoft® Word.
- You can create a custom report on solutions and categories. Select the `Category Name` field to display the solution's category and the `Parent Category Name` field to display the category directly above the solution's category.
- If you restrict your report to solutions in a particular category, the report includes only solutions that are directly associated with that category. It does not include solutions in subcategories of the specified category.
- To report on uncategorized solutions, use the advanced report filters. Choose the `Category Name` field and the "equals" operator, and leave the third field blank.

- When reporting on case comments, use the `Public Case Commented` field to indicate if the comment is private or public. Public comments are indicated with a check mark. To limit report results to public comments, customize the report and add a field filter where `Public Case Commented equals True`. Likewise, the filter `Public Case Commented equals 0` yields only private case comments.
- When reporting on first-call resolution of cases, add the `Closed When Created` field to your report. This field indicates cases that were closed by support reps via the **Save & Close** button during the creation of the case.
- Choose the `Closed by Self-Service User` field to report on how many cases have been closed by users via suggested solutions on the Self-Service portal.
- When reporting on cases, add the `Parent Case Number` field to your report. This field indicates if a case is associated with a parent case.
- You can report on case teams in which you are a member. After you run a case report, select `My case team's cases` from the `Show` drop-down.
- Portal users can only report on objects set to Private in the organization-wide default sharing model. Some objects, such as solutions and articles, are not included in the sharing model and cannot be reported on by Customer Portal users.
- `Owner Role` for case reports is defined differently than for other objects. For most objects, `Owner Role` is defined in the `Role Name as displayed on reports` field on the user's role. Cases uses the `Label` field instead.

Support Report Fields

In addition to the standard and custom fields for cases and solutions, you can report on the following fields in support reports:

Cases	
Field	**Description**
`# Cases Submitted`	The number of cases submitted by Self-Service users via the Self-Service portal. (Self-Service Usage Report)
`# Cases Viewed`	The number of cases viewed by Self-Service users via the Self-Service portal. (Self-Service Usage Report)
`# Comments Added`	The number of comments added to all cases by Self-Service users via the Self-Service portal. (Self-Service Usage Report)
`Entitlement Process Start Time`	The time the case entered an entitlement process. This field displays if an entitlement process applies to the case.
`Entitlement Process End Time`	The time the case exited an entitlement process. This field displays if an entitlement process applies to the case.
`Super User`	A contact enabled to view case information, add comments, and upload attachments for all cases submitted via the Self-Service portal by anyone in his or her company. (Self-Service User Report)

Cases	
Field	**Description**
`Self-Service Commented`	A checkbox showing a comment was added to a case via the Self-Service portal.
`New Self-Service Comment`	A checkbox showing a comment has been added to a case via the Self-Service portal and has not been reviewed by the case owner.
`Is Incoming`	A checkbox showing a case was received by email via the Email-to-Case or On-Demand Email-to-Case feature. (Cases with Emails Report)
`Age`	The age of an open case is the elapsed time from creation to the present. The age of a closed case is the elapsed time from creation to the closing time of the case. Note that the age of a case does *not* take into account any holidays that are associated with the case's business hours. Holidays suspend business hours during specified dates and times.
`Closed`	A checkbox showing a case has a closed status.
`Escalated`	A checkbox showing a case was escalated by an escalation rule.
`Public Case Commented`	A checkbox showing a case has comments that may be displayed via the Self-Service portal.
`Has Attachment`	A checkbox showing a case with emails has attachments. (Cases with Emails Report)
`Old Value`	The value in a tracked case or solution field before it was changed. (Case History Report and Solution History Report)
`New Value`	The value in a tracked case or solution field after it was changed. (Case History Report and Solution History Report)
`Business Hours`	The number of business hours that have elapsed since a case was last updated. Note that holidays are *not* taken into account for this field. Holidays suspend business hours during specified dates and times. (Case History Report)
`Business Hours Since Similar Change`	The number of hours that elapsed since the same field on a case was last updated. Note that holidays are *not* taken into account for this field. Holidays suspend business hours during specified dates and times. (Case History Report)

Cases	
Field	**Description**
`History ID`	The unique identifier for each change tracked on a specified case or solution field. (Case History Report and Solution History Report)
`Contact Account Name`	The account associated with the contact on the case. View together with the `Account Name` field to see if the account on the case is different from the account on the contact.
`Parent Case ID`	The ID of a parent case, which can be used to access a parent case via the API.

Solutions	
Field	**Description**
`# Solution Searches`	The number of solution searches performed by Self-Service users via the Self-Service portal. (Self-Service Usage Report)
`Self-Service Access Count`	The number of times a solution was viewed in the Self-Service portal.
`Self-Service Answer Count`	The number of times the survey question “Does this Solution help you answer your question?” is answered, either positively or negatively, on a solution in the Self-Service portal.
`Self-Service Positive Count`	The number of times the survey question “Does this Solution help you answer your question?” is answered positively on a solution in the Self-Service portal.
`Author`	The name of the user who originally created the solution.
`Num Related Cases`	The number of cases associated with the solution.
`Reviewed`	Checkbox that indicates whether the solution has a reviewed status.
`Old Value`	The value in a tracked case or solution field before it was changed. (Case History Report and Solution History Report)
`New Value`	The value in a tracked case or solution field after it was changed. (Case History Report and Solution History Report)
`History ID`	The unique identifier for each change tracked on a specified case or solution field. (Case History Report and Solution History Report)
`Language`	The language in which the master solution is written.

Solutions	
Field	**Description**
`Translation Language`	The language in which the translated solution is written. (Translated Solutions report)
`Solution ID`	The unique identifier for each solution. (Translated Solutions report)
`Out of Date`	Checkbox that indicates that the translated solution may need translating to match its master solution. (Translated Solutions report)
`Master Solution Title`	The title of the master solution. Displays up to 250 characters.
`Translated Solution Title`	The title of the translated solution. Displays up to 250 characters.
`Master Solution Details`	The solution details of the master solution. Displays up to 1000 characters.
`Translated Solution Details`	The solution details of the translated solution. Displays up to 1000 characters.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Territory Reports

Use territory reports to analyze your sales territories. Identify which users have been assigned to which territories, which users have been assigned more than one territory, or which users have no territories.

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Special Features of Territory Reports

Consider the following when running territory reports:

Standard Reports

- The territory report lists all territories in your organization. Select **No Users** in the `Users` drop-down list and click **Run Report** to see the territories in your organization that do not have any assigned users.
- The User Territory report, User Multiple Territory report, and User Missing Territory report summarize the users who have been assigned to any territories, more than one territory, or no territories, respectively.

- The Account Territory report, Account Multiple Territory report, and Account Missing Territory report summarize the accounts that have been assigned to any territories, more than one territory, or no territories, respectively.
- The Opportunity Territory report summarizes the opportunities that are in territories. To see opportunities owned by users who are not currently active in the opportunity's territory, customize the Opportunity Territory report with the following advanced filter: `Active in Territory` equals “False.” The Opportunity Missing Territory report summarizes the opportunities that are associated with accounts that do not have a territory.
- Reports run from custom report types that include territories may display results differently than standard reports that include territories. This is because reports run from custom report types only display results *with* territories, such as accounts with territories, whereas standard reports that include territories may display results *without* territories. For example, if you select the Account Territory Report, results display accounts without territories. In custom report types, when using the `Territories` filter that includes territories, Multiple Territories or Missing Territories are not shown in the report results.

Tips for Territory Reports

- Standard and custom territory fields are available in territory reports. They are also available in account reports, activity reports that include accounts, opportunity reports, and user reports.

See Also:

Build a Report From a Template
The Report Run Page
Limit Report Results
Build a Report From a Template

Create Your Own Custom Report Type

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of pre-defined standard report types; administrators can create custom report types as well.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create or update custom report types:	“Manage Custom Report Types”
To delete custom report types:	“Modify All Data”

For example, an administrator can create a report type that shows only job applications that have an associated resume; applications without resumes won't show up in reports using that type. An administrator can also show records that *may* have related records—for example, applications with or without resumes. In this case, all applications, whether or not they have resumes, are available to reports using that type. There is a limit to the total number of custom report types you can create.

See Also:

Get the Right Data into Your Report
Choose Object Relationships for Custom Report Types
Create a Custom Report Type
Manage Custom Report Types
Report Types Tips and Considerations
Edit the Report Field Layout for a Custom Report Type
Set Up a Custom Report Type
How do I know which report type a report is using?
Manage Custom Report Types
How Salesforce Analytics Works

Choose Object Relationships for Custom Report Types

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create or update custom report types:	"Manage Custom Report Types"
To delete custom report types:	"Modify All Data"

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type.

To add child objects to the report type:

1. Click the box under the primary object.
2. Select a child object. Type in the search box to find objects quickly. Only related objects are shown.
3. For each child object, select one of the following criteria:
   - `Each "A" record must have at least one related "B" record`. Only parent records with child records are shown in the report.
   - `"A" records may or may not have related "B" records`. Parent records are shown, whether or not they have child records.

   When Users are the primary object, select child objects by field—for example, Accounts (Account Owner) or Accounts (Created By).
4. Add up to three child objects. The number of children depends on the objects you choose.

5. Click **Save**.

See Also:

Create Your Own Custom Report Type
Manage Custom Report Types
Create Your Own Custom Report Type
Report Types Tips and Considerations

Create a Custom Report Type

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create or update custom report types:	"Manage Custom Report Types"
To delete custom report types:	"Modify All Data"

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type.

To create a custom report type:

1. From Setup, click **Create** > **Report Types**.
2. Click **New Custom Report Type**.
3. Select the `Primary Object` for your custom report type. You can choose from all objects—even those you don't have permission to view. This lets you build report types for a variety of users. Once you save a report type, you can't change the primary object.
4. Enter the `Report Type Label` and the `Report Type Name`. The label can be up to 255 characters long. The name is used by the SOAP API.
5. Enter a description for your custom report type, up to 1000 characters long. It's extremely important to provide a meaningful description so users have a good idea of which data is available for reports. For example: `Accounts with Contacts. Report on accounts and their contacts. Accounts without contacts are not shown..`
6. Select the category to store the custom report type in.
7. Select a `Deployment Status`:
   - Choose `In Development` during design and testing, as well as editing. The report type and its reports are hidden from all users, except those with the "Manage Custom Report Types" permission. Only users with that permission can create and run reports using report types in development.
   - Choose `Deployed` when you're ready to let all users access the report type.

   Note: A custom report type's `Deployment Status` changes from `Deployed` to `In Development` if its primary object is a custom object whose `Deployment Status` similarly changes.

8. Click **Next**.

Note: A developer can edit a custom report type in a managed package after it is released, and add new fields. Subscribers automatically receive these changes when they install a new version of the managed package. However, developers can't remove objects or fields from the report type once the package is released.

See Also:

Create Your Own Custom Report Type
Manage Custom Report Types
Create Your Own Custom Report Type
Report Types Tips and Considerations
Choose Object Relationships for Custom Report Types

Manage Custom Report Types

After you create a custom report type, you can customize, edit, and delete it.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create or update custom report types:	"Manage Custom Report Types"
To delete custom report types:	"Modify All Data"

From Setup, click **Create** > **Report Types** to display the All Custom Report Types page, which shows the list of custom report types defined for your organization.

From the All Custom Report Types page, you can:

- Select a list view from the `View` drop-down list to go directly to that list page, or click **Create New View** to define your own custom view.
- Define a new custom report type by clicking **New Custom Report Type**.
- Update a custom report type's name, description, report type category, and deployment status by clicking **Edit** next to a custom report type's name.
- Delete a custom report type by clicking **Del** next to the custom report type's name. All the data stored in the custom report type will be deleted and cannot be restored from the Recycle Bin.

  Important: When you delete a custom report type, any reports based off it will also be deleted. Furthermore, any dashboard components created from a report based off of a deleted custom report type display an error message when viewed.

- Display detailed information about a custom report type and customize it further by clicking a custom report type's name. After you click a custom report type name you can:
  - ◊ Update which object relationships a report can display when run from the custom report type.
  - ◊ Edit the page layout of the custom report type to specify which standard and custom fields a report can display when created or run from the custom report type.

◊ See how the fields display to users in reports run from the custom report type by clicking **Preview Layout** on the Fields Exposed for Reporting section.
◊ Create a new custom report type with the same object relationships and fields as the selected custom report type by clicking **Clone**.
◊ Rename fields in the report.
◊ Set which fields are selected by default.

Note: If the Translation Workbench is enabled for your organization, you can translate custom report types for international users.

See Also:

Create Your Own Custom Report Type
Create a Custom Report Type
Create Your Own Custom Report Type
Edit the Report Field Layout for a Custom Report Type

Report Types Tips and Considerations

Before you begin creating custom report types for your organization, review these tips and limitations.

Defining Report Types

Consider the following when defining report types:

- If the primary object on a report type is a custom object, and the custom object is deleted, then the report type and any reports created from it are automatically deleted. Report types associated with custom objects in the Deleted Custom Objects list count against the maximum number of custom report types you can create.
- If you remove an object from a report type, all references to that object and its associated objects are automatically removed from reports and dashboards based on that type.
- Custom report types have some limits on the number of items included:

  ◊ A custom report type can contain up to 60 object references. These objects can be used as the main four objects, as sources of fields via lookup, or as objects used to traverse relationships. Each referenced object counts toward the maximum limit even if no fields are chosen from it. For example, if you do a lookup from account to account owner to account owner's role, but select no fields from account owner, all the referenced objects still count toward the limit of 60.
  ◊ You can add up to 1000 fields to each custom report type. A counter at the top of the Page Layout step shows the current number of fields included. If you have too many fields, you can't save the layout.
  ◊ You can't add forecasts to custom report types.
  ◊ You can't add the following fields to custom report types:

    - Product schedule fields
    - History fields
    - Person account fields
    - The `Age` field on cases and opportunities

  ◊ Reports run from custom report types that include cases do not display the `Units` drop-down list, which allows users to view the time values of certain case fields by hours, minutes, or days.

Choosing Object Relationships

- You can create custom report types from which users can report on your organization's reports and dashboards. When defining a custom report type, select Reports or Dashboards from the `Primary Object` drop-down list on the New Custom Report Type page.
- Preselect commonly used fields via a custom report type by clicking **Edit Properties** on the field layout, and then selecting the `Checked by Default` checkbox next to the field.
- Reduce the amount of time it takes a user to find fields to report on by grouping similar fields together on custom report types' field layouts. Furthermore, you can create new page sections in which to group fields that are related to one another. Additionally, you can group fields to match specific detail pages and record types.
- A custom report type can contain up to 60 object references. For example, if you select the maximum limit of four object relationships for a report type, then you could select fields via lookup from an additional 56 objects. However, users will receive an error message if they run a report from a custom report type and the report contains columns from more than 20 different objects.
- Note the following about selecting the child object relationship:

  ◊ If you select that object A may or may not have object B, then all subsequent objects automatically include the may-or-may-not association on the custom report type. For example, if accounts are the primary object and contacts are the secondary object, and you choose that accounts may or may not have contacts, then any tertiary and quaternary objects included on the custom report type default to may-or-may-not associations.

  ◊ Blank fields display on report results for object B when object A does not have object B. For example, if a user runs a report on accounts with or without contacts, then contact fields display as blank for accounts without contacts.

  ◊ On reports where object A may or may not have object B, you can't use the OR condition to filter across multiple objects. For example, if you enter filter criteria `Account Name starts with M OR Contact First Name starts with M`, an error message displays informing you that your filter criteria is incorrect.

  ◊ The `Row Limit` option on tabular reports shows only fields from the primary object on reports created from custom report types where object A may or may not have object B. For example, in an accounts with or without contacts report, only fields from accounts are shown. Fields from objects after a may-or-may-not association on custom report types aren't shown. For example, in an accounts with contacts with or without cases report, only fields from accounts and contacts are available to use. Also, existing reports may not run or disregard the `Row Limit` settings if they were created from custom report types where object associations changed from object A with object B to object A with or without object B.

See Also:

Create Your Own Custom Report Type
Create a Custom Report Type
Choose Object Relationships for Custom Report Types
Opportunity Reports

Edit the Report Field Layout for a Custom Report Type

After you define a custom report type and choose its object relationships, you can specify the standard and custom fields a report can display when created or run from a custom report type.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create or update custom report types:	"Manage Custom Report Types"
To delete custom report types:	"Modify All Data"

Note: Custom fields don't appear in custom report types unless they've been added to that report type's page layout.

1. From Setup, click **Create** > **Report Types** to display the All Custom Report Types page.
2. Select the name of a custom report type.
3. Click **Edit Layout** on the Fields Available for Reports section.

   Note: You can click **Preview Layout** to preview which fields will display on the Select Columns page of a report customized or run from this report type. When previewing the layout, all fields and objects are displayed, including fields and objects you may not have permission to access. However, you cannot access any data stored in the fields or objects that you do not have permission to access.

4. Select fields from the right-hand box and drag them to a section on the left.

   You can view a specific object's fields by selecting an object from the `View` drop-down list.
5. Optionally, click **Add fields related via lookup** to display the Add Fields Via Lookup overlay, from which you can add fields via the lookup relationship the object selected in the `View` drop-down list has to other objects.
   - A lookup field is a field on an object that displays information from another object. For example, the `Contact Name` field on an account.
   - A custom report type can contain fields available via lookup through four levels of lookup relationships. For example, for an account, you can get the account owner, the account owner's manager, the manager's role, and that role's parent role.
   - You can only add fields via lookup that are associated with objects included in the custom report type. For example, if you add the accounts object to the custom report type, then you can add fields from objects to which accounts have a lookup relationship.
   - Selecting a lookup field on the Add Fields Via Lookup overlay may allow you to access additional lookup fields from other objects to which there is a lookup relationship. For example, if you select the `Contact Name` field from cases, you can then select the `Account` field from contacts because accounts have a lookup relationship to contacts which have a lookup relationship to cases.

     You can access up to four levels of object relationships via lookup.
   - The fields displayed in the Add Fields Via Lookup overlay do not include lookup fields to primary objects. For example, if accounts are the primary object on your custom report type, and contacts are the secondary object, then the Add Fields Via Lookup overlay does not display lookup fields from contacts to accounts.
   - Fields added to the layout via the **Add fields related via lookup** link are automatically included in the section of the object from which they are a lookup field. For example, if you add the `Contact` field as a lookup from accounts, then the `Contact` field is automatically included in the Accounts section. However, you can drag a field to any section.
   - Fields added via lookup automatically display the lookup icon on the field layout of the custom report type.
   - If you include activities as the primary object on a custom report type, then you can only add lookup fields from activities to accounts on the select column layout of the custom report type.

A custom report type can contain up to 60 object references. For example, if you select the maximum limit of four object relationships for a report type, then you could select fields via lookup from an additional 56 objects. However, users will receive an error message if they run a report from a custom report type and the report contains columns from more than 20 different objects.

6. Arrange fields on sections as they should appear to users. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

   You can add up to 1000 fields to each custom report type.

7. Click **Preview Layout** and use the legend to determine which fields are included on the layout, added to the report by default, and added to the layout via a lookup relationship.

   Warning: Users can view roll-up summary fields on reports that include data from fields they do not have access to view. For example, a user that does not have access to view the `Price` field on an opportunity product can view the `Total Price` field on opportunity reports if he or she has access to the `Total Price` field.

8. To rename or set which fields are selected by default for users, select one or more fields and click **Edit Properties**.
   - Click the `Checked by Default` checkbox next to the field you want selected by default.

     Fields selected by default automatically display the checkbox icon (✓) on the field layout of the custom report type.
   - Change the text in the `Display As` field next to the field you want to rename.

     Note: Renamed fields from standard objects, as well as renamed standard objects, do not display as such on the field layout of the custom report type. However, renamed fields from standard objects and renamed standard objects do display their new names on the report and the preview page, which you can access by clicking **Preview Layout**.

9. To rename the sections, click **Edit** next to an existing section, or create a new section by clicking **Create New Section**.
10. Click **Save**.

See Also:

Create Your Own Custom Report Type
Manage Custom Report Types
Create Your Own Custom Report Type
Create a Custom Report Type

Set Up a Custom Report Type

Set up a custom report type by choosing its child objects and relationships, editing its page layout, and creating a report with that report type.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create or update custom report types:	“Manage Custom Report Types”
To delete custom report types:	“Modify All Data”

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type.

To set up a custom report type:

1. Create a custom report type.
2. Choose the child objects and relationships.
3. Edit the layout.
4. Create a report using the report type to make sure it has the fields users need.

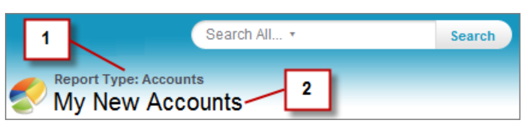
   When you finish testing, deploy it to users by setting `Deployment Status` to `Deployed`.
5. Optionally, you can do the following:
   - Add the custom report type to apps you upload to Force.com AppExchange.
   - Users designated as a translator with the “View Setup and Configuration” permission can translate custom report types using the Translation Workbench.

See Also:

Create Your Own Custom Report Type
Create Your Own Custom Report Type
Report Types Tips and Considerations
Create a Custom Report in Accessibility Mode
Create a Custom Report Type
Edit the Report Field Layout for a Custom Report Type
Choose Object Relationships for Custom Report Types

How do I know which report type a report is using?

When you edit a report, you can see the report type displayed above the report name in report builder. The report type isn't displayed on the report run page.



1. Report type
2. Report name

See Also:

Create Your Own Custom Report Type

Report on Related Objects with Cross Filters

Use a cross filter to fine-tune your results by including or excluding records from related objects, without having to write formulas or code. You can apply cross filters by themselves, or in combination with field filters.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Watch a Demo: Using Cross Filters in Reports (2:40)

To change a report filter, hover over it and click **Edit** or **Remove**. Your filters display when you run your report; click **Edit** on that page to make additional changes.

Add *subfilters* to further filter by fields on the child object. For example, if you have a cross filter of `Accounts with Opportunities`, click **Add Opportunity Filter** and create the `Opportunity Nameequals ACME` subfilter to see just those opportunities. You can create up to five subfilters for each cross filter.

- Each report can have up to three cross filters.
- Each cross filter can have up to five subfilters.
- Filter logic applies only to field filters, not cross filters.

See Also:

Get the Right Data into Your Report
Create a Cross Filter
Example: Using WITH in Cross Filters
Example: Using WITHOUT in Cross Filters
Example: Using Multiple Cross Filters
Tips for Working with Cross Filters
Filter Choices
Filter Your Report Data
Create a Cross Filter

Create a Cross Filter

Use cross filters to include or exclude records in your report results based on related objects and their fields.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Watch a Demo: Using Cross Filters in Reports (2:40)

1. In the Filters pane of report builder, click **Add** > **Cross Filter**.
2. Select a parent object from the drop-down list. Your choice determines which related objects you see in the child object list.

   Tip: In report types based on Campaigns, the parent object can be the secondary object in the report type. For example, in a "Campaigns with Leads" report, the parent object can be `Campaigns` or `Leads`.

3. Choose `with` or `without`.
4. Select a child object from the drop-down or search by its name. The drop-down list contains all eligible child objects of your selected parent object.
5. Optionally add subfilters:
   a. Click **Add *`Your Related Child Object`* Filter**.
   b. Select a field. The fields are determined by the child object in the cross filter. For example, if your cross filter is `Accounts with Cases`, you can use case fields for your subfilter.
   c. Choose a filter operator.
   d. Enter a value.
6. Click **OK**.

See Also:

Report on Related Objects with Cross Filters
Example: Using Multiple Cross Filters
Example: Using WITH in Cross Filters
Example: Using WITHOUT in Cross Filters

Example: Using WITH in Cross Filters

Use cross filters to filter a report by an object's child objects using WITH conditions. For example, filter a report to show just accounts with cases.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Let's say a recent campaign in California won you a lot of new customers. You want to ensure that their customer cases get resolved quickly. You can create a report to see which of those accounts currently have cases.

1. Create a new report. For the report type, click **Accounts & Contacts**, select **Accounts**, and click **Create**.
2. In the report builder's Filters pane, set the appropriate standard filters.
3. Create a field filter where `Billing State/Province equals CA` and click **OK**.
4. Click **Add** > **Cross Filter** and specify `Accounts with Cases`.

When you click **Run Report**, the results will include only California accounts with an associated case.

See Also:

Report on Related Objects with Cross Filters
Create a Cross Filter

Example: Using WITHOUT in Cross Filters

Use cross filters to filter a report by an object's child objects using WITHOUT conditions. For example, filter a report to show just contacts without activities.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Let's say that you've just imported a list of California accounts and you want to find which ones are missing contacts before you assign owners:

1. Create a new report. For the report type, click **Accounts & Contacts**, select **Accounts**, and click **Create**.
2. In the report builder's Filters pane, set the appropriate standard filters.
3. Create a field filter where `Billing State/Province equals CA` and click **OK**.
4. Click **Add** > **Cross Filter** and specify `Accounts without Contacts.`

When you click **Run Report**, the results will include only California accounts without an associated contact.

See Also:

Report on Related Objects with Cross Filters
Create a Cross Filter

Example: Using Multiple Cross Filters

Use cross filters to filter a report by an object's child objects using both WITH and WITHOUT conditions. For example, filter a report to show accounts that have cases but don't have activities.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Say you're a salesperson who wants to see which customer accounts have unresolved problem escalations because you want to ensure your support team takes care of them.

1. Create a new report. For the report type, click **Accounts & Contacts**, select **Accounts**, and click **Create**.
2. In the report builder's Filters pane, set the appropriate standard filters.
3. To limit your report to customer accounts, click **Add** > **Field Filter** and specify `Type equals Customer`.
4. To see which accounts have no activities, click **Add** > **Cross Filter** and specify `Accounts without Activities`.
5. To see only accounts without completed activities, add a subfilter to your cross filter:
   a. Click **Add Activities Filter** and specify `Status equals Completed`.
   b. Click **OK**.
6. To include your accounts that currently have cases, add another cross filter but this time specify `Accounts with Cases`.
7. To exclude cases that were not escalated, add a subfilter to this cross filter:
   a. Click **Add Cases Filter** and specify `Type equals Problem`.
   b. Click **Add Cases Filter** again, but this time specify `Status equals Escalated`.
   c. Click **OK**.

When you run the report, it will include only customer accounts without completed activities with escalated cases.

See Also:

Report on Related Objects with Cross Filters
Create a Cross Filter

Tips for Working with Cross Filters

Cross filters work like ordinary filters, but they have some special characteristics of their own.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

- Adding cross filters can potentially slow down your report. To avoid having the report or preview time out, limit the data returned by setting filters. For example, select `My opportunities` for `Show` and `Current FQ` for `Range` instead of viewing all opportunities for all time.
- Since the objects available in cross filters depend on the parent object of the report type you choose, consider the related child objects before selecting a report type. For example, choose the Accounts report type to filter on `Accounts with Partners` because Partner is a child object of Account.
- Cross filters work in conjunction with your report type selection. Cross filters have an AND relationship with the report type you select. Therefore, choosing a report type of Accounts with Partners and adding a cross filter for `Accounts without Partners` will yield no results.
- Report builder is required to create or edit cross filters. Without it, you can run reports with cross filters, but you can't create or edit them.

See Also:

Report on Related Objects with Cross Filters
Example: Using Multiple Cross Filters
Create a Cross Filter
Example: Using WITH in Cross Filters
Example: Using WITHOUT in Cross Filters

Categorize Data Quickly with Buckets

Bucketing lets you quickly categorize report records without creating a formula or a custom field. When you create a bucket field, you define multiple categories (buckets) used to group report values.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

Watch a Demo: Getting Started with Buckets (3:00 minutes)

Bucketing lets you quickly categorize report records without creating a formula or a custom field. For example, create a bucket field named `Size` based on the `# Employees` field. Then, create buckets that group records into "Large," "Medium," or "Small" ranges that you define. Bucket fields can be used like any other field to sort, filter, and group your report.

Note: Report builder is required to create or edit buckets. Without it, you can run reports with buckets, but you can't create or edit them.

See Also:

Get the Right Data into Your Report
Add a Bucket Field
Edit a Bucket Field
Edit a Numeric Bucket Field
Numeric Bucketing Example: Deal Size
Edit a Picklist Bucket Field
Picklist Bucketing Example: Industry Types
Edit a Text Bucket Field
Enter Values for Text Buckets
Text Bucketing Example: Strategic Accounts
Add a Bucket Field
Add a Bucket Field
Edit a Bucket Field
Edit a Bucket Field
Enter Values for Text Buckets
Edit a Numeric Bucket Field
Numeric Bucketing Example: Deal Size
Edit a Picklist Bucket Field
Picklist Bucketing Example: Industry Types
Edit a Text Bucket Field
Text Bucketing Example: Strategic Accounts

Add a Bucket Field

Create a bucket field to contain the buckets into which you will organize your report data.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

You can add up to five bucket fields per report, each with up to 20 buckets.

1. In the Fields pane of the report builder, double-click **Add Bucket Field** or drag it into the report preview. You can also click a column menu for a field in the report and select **Bucket this Field**.
2. Edit the bucket field according to the field type.

- Edit a Numeric Bucket Field
- Edit a Picklist Bucket Field
- Edit a Text Bucket Field

See Also:

Categorize Data Quickly with Buckets
Categorize Data Quickly with Buckets

Edit a Bucket Field

Set up your bucket field by specifying the buckets that it contains and the values that go in the buckets.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. In the report builder Fields pane under Bucket Fields, hover over a bucket field and click . Or in the Preview pane, click the bucket field column menu and select **Edit Bucket Field**.
2. Edit the bucket field according to the field type.

- Edit a Numeric Bucket Field
- Edit a Picklist Bucket Field
- Edit a Text Bucket Field

See Also:

Categorize Data Quickly with Buckets
Categorize Data Quickly with Buckets

Edit a Numeric Bucket Field

A numeric bucket helps you sort data that can be described in terms of numbers.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

In the Edit Bucket Field overlay for a numeric field:

1. For `Source Column`, select the field you want to bucket.
2. Enter a bucket field name. This appears as the column name in the report.

   Since a bucket field is intended to have multiple buckets (known as "ranges" in numeric bucket fields) within it, a good name for a bucket field describes the scope of the ranges. For example, a bucket field named "Size" could have ranges of "Small," "Medium," and "Large".
3. Define your ranges by entering a number and a name. The range names appear as values in your new column.

   Each range is greater than the lower number up to and including the higher number.

   To remove all ranges and start over, click **Clear All**.
4. To move all empty values to the bucket containing the value zero, enable `Treat empty source column values in the report as zeros.`

   If this is disabled, unbucketed values appear as a dash (-) in the column.
5. Click **OK**.

In a report, numeric bucket columns are sorted by range values.

See Also:

Categorize Data Quickly with Buckets
Numeric Bucketing Example: Deal Size
Categorize Data Quickly with Buckets

Numeric Bucketing Example: Deal Size

To gain insight into your deals, use bucketing to group by deal size instead of looking at individual deals. This lets you concentrate on the large deals that affect your quota the most.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

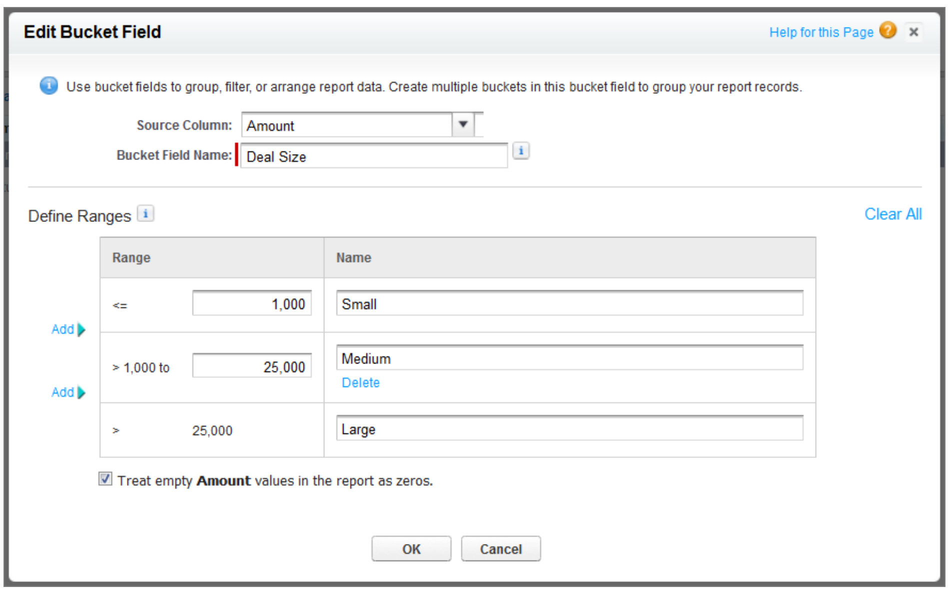
User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Create or edit a standard opportunity report.

2. In the Fields pane of the report builder, double-click **Add Bucket Field** or drag it into the report.
3. For Source Column, select `Amount`.
4. For Bucket Field Name, enter `Deal Size`.
5. Under Define Ranges, enter `1000` in the first row. This represents the maximum for a small deal. Name this range `Small`.
6. Click **Add** and enter `25000` in the second row. This represents the maximum for a medium-size deal. Name this range `Medium`.
7. By default, the last range is any amount over the previous range. You don't need to enter a number for this range. Name this range `Large`.
8. Click **OK**.

With numeric bucket fields, each range is greater than the lower number, up to and including the higher number. Once you've set up this bucket field, amounts will be bucketed as follows:

Amounts	Bucket
1000 or less	Small
1001 to 25000	Medium
25001 or more	Large



See Also:

Categorize Data Quickly with Buckets
Edit a Numeric Bucket Field

Edit a Picklist Bucket Field

A picklist bucket field contains items that can be selected from a list.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Note: The following picklist types can't be bucketed.

- Record types
- Divisions
- Multi-value picklists
- The `Type` picklist in Activity reports

In the Edit Bucket Field overlay for a picklist field:

1. For `Source Column`, select the field you want to bucket.
2. Enter a bucket field name. This appears as the column name in the report.

   Since a bucket field is intended to have multiple buckets within it, a good name for a bucket field describes the scope of the buckets. For example, a bucket field named "Priority" could have "High," "Medium," and "Low" buckets.

   Important: Picklist bucket names must include one or more letters or symbols. If a picklist bucket field includes a bucket whose name contains only numbers, the bucket field cannot be saved.

3. To create a bucket, click **New Bucket** and enter a bucket name. Create multiple buckets to group your report records.
4. To find a particular value in the list of values, type the first few characters of its name in the Quick Find box. As you type, items that match your search terms appear in the menu.
5. Select values and drag them into a bucket. Alternatively, select values, click **Move To**, and select a bucket or enter a new bucket name.

   While you're bucketing values, use these functions as needed:

   - To show all the values in the report, click **All Values**.
   - To show the values for a particular bucket, click the bucket name.
   - To remove values from a bucket, select the values and drag them to another bucket, or drag them to **Unbucketed Values**.

   Note: You can bucket only active picklist values. Inactive picklist values aren't shown.

6. To move all unbucketed values into a bucket named "Other", enable `Show unbucketed values as "Other"`. If this is disabled, unbucketed values appear in the bucket column with the value name.
7. Click **OK**.

In a report, picklist bucket columns are sorted by the bucket position as shown in the Edit Bucket Field dialog box, followed by "Other" if `Show unbucketed values as "Other"` is enabled, or the unbucketed picklist item names if `Show unbucketed values as "Other"` is disabled.

See Also:

Categorize Data Quickly with Buckets
Categorize Data Quickly with Buckets
Picklist Bucketing Example: Industry Types

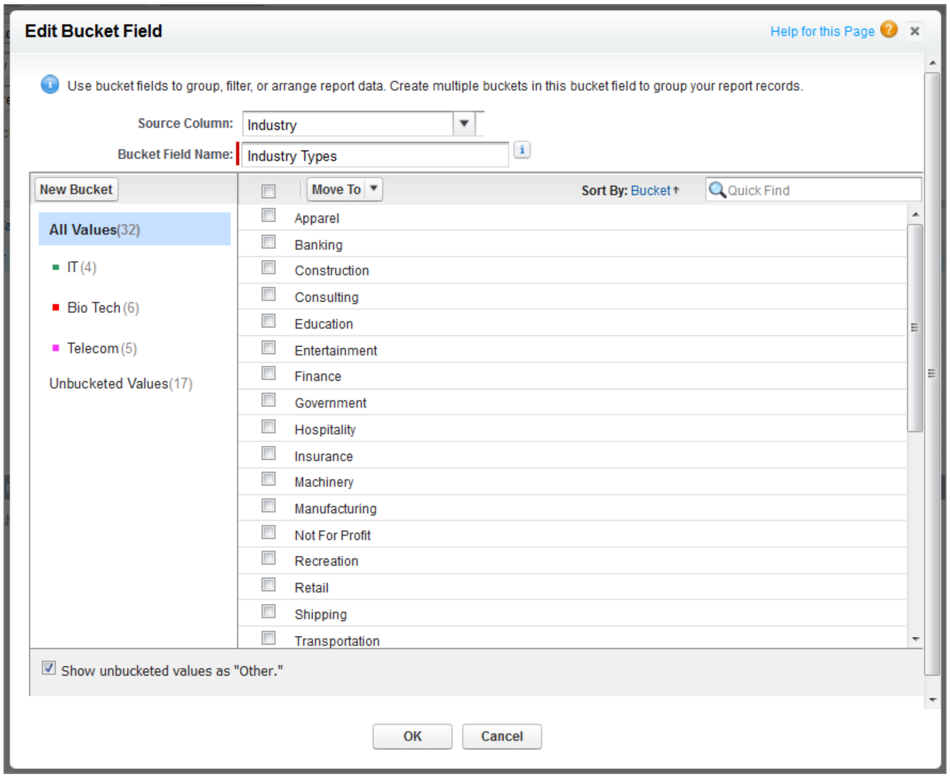
Picklist Bucketing Example: Industry Types

Use a picklist bucket field to sort your accounts by their industry.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Create or edit a standard accounts report, making sure at least a few records appear in the report.
2. In the Fields pane of the report builder, double-click **Add Bucket Field** or drag it into the report.
3. For Source Column, select `Industry`.
4. For Bucket Field Name, enter `Industry Types`.
5. Click **New Bucket** and name the bucket `IT`.
6. Click **New Bucket** and name the bucket `Bio Tech`.
7. Click **New Bucket** and name the bucket `Telecom`.
8. Select values and drag them into the appropriate buckets.
9. Enable `Show unbucketed values as "Other"`.
10. Click **OK**.



See Also:

Categorize Data Quickly with Buckets
Edit a Picklist Bucket Field

Edit a Text Bucket Field

A text bucket helps you sort out values that consist of words or phrases.

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Note: The following text types can't be bucketed.

- Text area
- Text area—long
- Text area—rich

- Text area—encrypted
- URL
- Date
- Date/Time

In the Edit Bucket Field overlay for a text field:

1. For `Source Column`, select the field you want to bucket.
2. Enter a bucket field name. This appears as the column name in the report.

   Since a bucket field is intended to have multiple buckets within it, a good name for a bucket field describes the scope of the buckets. For example, a bucket field named "Region" could have "East," "West," and "Central" buckets.
3. To create a bucket, click **New Bucket** and enter a bucket name. Create multiple buckets to group your report records.
4. To find a particular value in the list of values, type all or part of its name in the **Search for values...** box and click **Search**, or leave the box empty and click **Search**.

   The search returns up to 200 values.
5. Select values and drag them into a bucket. Alternatively, select values, click **Move To**, and select a bucket or enter a new bucket name.

   While you're bucketing values, use these functions as needed:

   - Use Enter Values to enter the exact name of a value you want to bucket, or to bucket values that may appear in your report later.
   - To show the values for a particular bucket, click the bucket name.
   - To remove values from a bucket, select the values, select **Move To**, and select a bucket or enter a new bucket name.
6. To move all unbucketed values into a bucket named "Other," enable `Show unbucketed values as "Other"`. If this is disabled, unbucketed values appear in the bucket column with the value name.
7. Click **OK**.

In a report, text bucket columns are sorted in alphanumeric order.

See Also:

Categorize Data Quickly with Buckets
Enter Values for Text Buckets
Categorize Data Quickly with Buckets
Text Bucketing Example: Strategic Accounts

Enter Values for Text Buckets

A text bucket field needs a descriptive name and two or more buckets containing text strings.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

If you know the exact value you want to bucket, you can use the Enter Values function to quickly bucket it without searching. This is useful if your report has a large number (such as millions) of values and searching for a value is slow. You can also use this method to enter and bucket values that may appear in your report later.

In the Edit Bucket Field overlay for a text field:

1. Click **Enter Values**.
2. Select the bucket where you want to move the values. If you select **New Bucket**, enter a name for the bucket.
3. Type one or more values in the box. Enter multiple values on separate lines.
4. Click **Move**.

See Also:

Categorize Data Quickly with Buckets
Edit a Text Bucket Field

Text Bucketing Example: Strategic Accounts

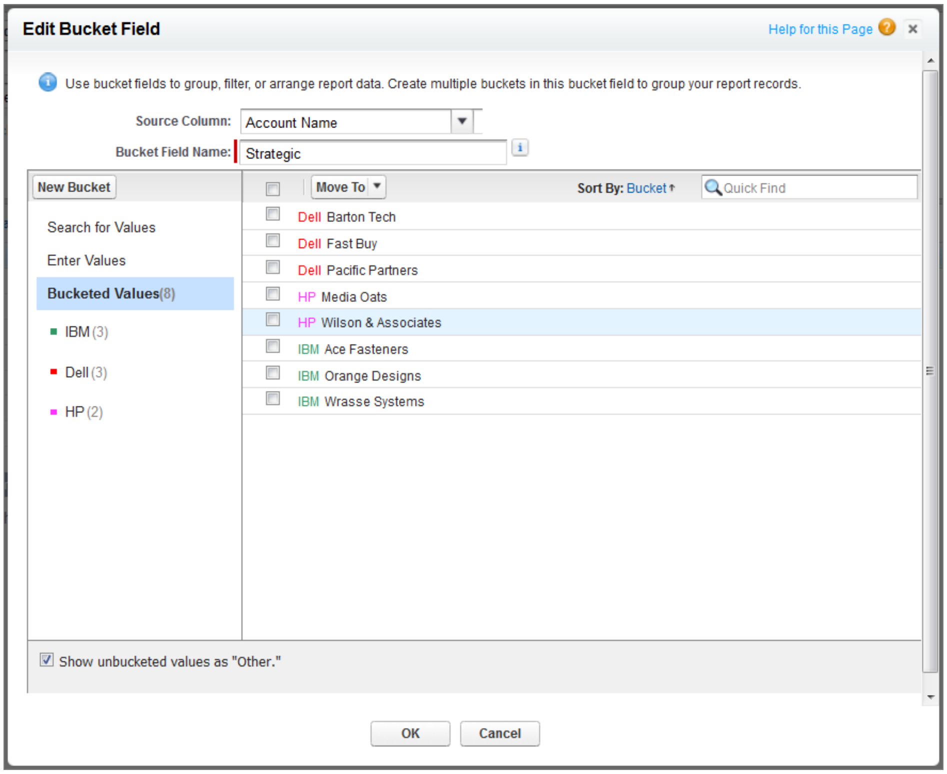
Use a text bucket to sort accounts into general categories that you can act on.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Create or edit a standard account report, making sure at least a few records appear in the report.
2. In the Fields pane of the report builder, double-click **Add Bucket Field** or drag it into the report.
3. For Source Column, select `Account Name`.
4. For Bucket Field Name, enter `Strategic`.
5. Click **New Bucket** and name the bucket `IBM`.
6. Click **New Bucket** and name the bucket `Dell`.
7. Click **New Bucket** and name the bucket `HP`.
8. To show the available values, leave the **Search for values...** box empty and click **Search**.
9. Select values and drag them into the appropriate buckets.
10. Enable `Show unbucketed values as "Other"`.

11. Click **OK**.



See Also:

Categorize Data Quickly with Buckets
Edit a Text Bucket Field

Combine Different Types of Information in a Joined Report

The joined report format lets you view different types of information in a single report. A joined report can contain data from multiple standard or custom report types.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Watch a Demo: Introducing Joined Reports in Salesforce (3:19 minutes)

To get started with joined reports, create a new or edit an existing report in report builder, click the **Format** drop-down, and choose `Joined`.

Most of the things you can do with summary or matrix reports you can also do with joined reports. For example, you can find, add, and remove fields; summarize fields; and run and save reports.

Currently, you can't do the following with joined reports:

- Add bucketed fields.
- Add cross filters.
- Drag and drop filters from the Fields pane on to the Filter pane.
- Apply conditional highlighting.
- Change the hierarchy for opportunity or activity reports.
- Create analytics snapshots based on joined reports.
- You can't filter data on a joined report in dashboard view or add a filter to a dashboard that only has joined reports.

You can show a joined report that includes a chart on a dashboard. Edit the joined report dashboard component and select **Use chart as defined in the source report**.

See Also:

Get the Right Data into Your Report
How Joined Reports Work
Run a Joined Report
Change the Principal Report Type
Add a Report Type to a Joined Report
Are Any Report Types Unavailable with Joined Reports?
Custom Summary Formulas with Joined Reports
Build a Custom Summary Formula for a Joined Report
Work with Blocks
Joined Report Examples
Build a New Report
How Joined Reports Work

How Joined Reports Work

A joined report can contain data from multiple standard or custom report types. You can add report types to a joined report if they have relationships with the same object or objects. For example, if you have a joined report that contains the Opportunities report type, you can add the Cases report type as well because both have a relationship with the Accounts object.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

A joined report consists of up to five report *blocks*, which you add to the report to create multiple views of your data. For each block, you can add regular and summary fields, create standard and cross-block custom summary formulas, apply filters, and sort columns. You apply groupings across all blocks in the report, and can add up to three groupings to the blocks, the same as for the summary format. You can also add a chart to a joined report.

When a joined report contains multiple report types, some fields are identified as *common* fields. A field is a common field if it's shared by all report types or if all report types share a lookup relationship to the field. These fields appear in the Common Fields area in the Fields pane, and can be used to group report blocks.

Each joined report has a *principal* report type. By default, the principal type is the first one added to the report, and is identified in the Fields pane with a small dot beside its name. For example, if you create the joined report by selecting the Opportunities report type, and then add the Cases type, the Opportunities type is the principal report type.

The principal report type controls how common fields are named. Some common fields have different names or appear in different sections in different report types. In those fields, click to see the name of the field in other report types.

Most of the things you can do with summary or matrix reports you can also do with joined reports. For example, you can find, add, and remove fields; summarize fields; and run and save reports. However, there are some things you can't do:

- Add bucketed fields.
- Add cross filters.
- Drag and drop filters from the Fields pane on to the Filter pane.
- Apply conditional highlighting.
- Change the hierarchy for opportunity or activity reports.
- Create analytics snapshots based on joined reports.
- When Chatter is disabled, joined reports can't be tagged.

Note:

- For users to be able to create and edit joined reports, report builder must be enabled for your entire organization. When report builder isn't enabled, users can run joined reports, but can't create them.
- Joined reports require that the new user interface theme is enabled. Users without the new theme are unable to create, edit, or run joined reports.
- Internet Explorer 6 is not supported for joined reports.
- You can't filter data on a joined report in dashboard view or add a filter to a dashboard that only has joined reports.

- How Joined Reports Work on page 119
- Running Joined Reports on page 121
- Changing the Principal Report Type on page 121
- Adding a Report Type to a Joined Report on page 122
- Are Any Report Types Unavailable with Joined Reports? on page 123
- Custom Summary Formulas with Joined Reports on page 124
- Building Custom Summary Formulas for Joined Reports on page 126
- Working with Blocks on page 127

See Also:

Combine Different Types of Information in a Joined Report
Build a New Report
Joined Report Examples
Combine Different Types of Information in a Joined Report

Run a Joined Report

Joined reports run in an updated version of the run reports page.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To run reports:	"Run Reports"
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

From the joined reports run page, you can:

- Click **Run Report** to run the report.
- Show or hide details
- Click **Customize** to open the report in report builder.
- Save or delete the report.
- Click **Report Properties** to change the report's name, description, or folder.
- View the report generation status.

See Also:

Combine Different Types of Information in a Joined Report
How Joined Reports Work

Change the Principal Report Type

The principal report type controls how common fields are named. A joined report must have a principal report type. You can change the principal report type at any time

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

By default, the first report type you add to the report is the principal.

The principal report type doesn't affect what data is available for reporting.

Change the principal report type by removing its blocks. To remove a block, drag it to the Fields pane. If there are multiple blocks based on the principal report type, you must remove them all.

When you remove the principal report type, the way the new report type is selected depends on how many report types the report contains.

- If the report contains only two report types, the other report type automatically becomes the principal.
- If the report contains more than two report types, a dialog displays that prompts you to pick one of them as the new principal report type.

See Also:

Combine Different Types of Information in a Joined Report
Add a Block to a Joined Report
Add a Report Type to a Joined Report
Run a Joined Report
Are Any Report Types Unavailable with Joined Reports?
Combine Different Types of Information in a Joined Report

Add a Report Type to a Joined Report

Adding a report type lets you expand the set of data available for analysis in a joined report.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Select `Joined` from the report format menu.
2. Click **Add Report Type**.

   The Choose an Additional Report Type overlay appears and displays the report types that you can add to the existing report.
3. Select the report type.

   The overlay displays a message that identifies the objects that are common to the selected report type and the types already included in the report.
4. Click **OK**.

The additional report type is added. Notice that:

- A new block appears in the report.

- The Fields pane updates with a new area that contains fields unique to the report type. Fields common to all report types are in the Common Fields area.

See Also:

Combine Different Types of Information in a Joined Report
Build a Custom Summary Formula for a Joined Report
How Joined Reports Work
Combine Different Types of Information in a Joined Report

Are Any Report Types Unavailable with Joined Reports?

Some standard report types can't be used in the joined report format.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

The standard report types listed below can't be used in the joined report format. When reviewing the list, keep the following in mind:

- You might not have access to all the report types listed here. Certain factors can affect the report types you see, such as which features your organization has enabled and how your administrator has set up report folder visibility. Check with your administrator if you think you should see a report type that you don't.
- If your organization has renamed standard objects, the names of the standard report types will contain your organization's names instead of the original ones. For example, if your organization has renamed the "Opportunity" object as "Deal," the standard report type "Opportunity Field History" will be renamed "Deal Field History."
- In the list below, report types marked with an asterisk (*) aren't available when you create a new report. Instead, you access them by customizing standard reports, which are in folders on the Reports tab.

These report types aren't available for use in joined reports.

- Accounts and Contacts
  - ◊ Account History
  - ◊ Account Owners*
  - ◊ Contact History
- Activities
  - ◊ My Delegated Approval Requests*
- Administrative
  - ◊ All Pending Approval Requests*
  - ◊ API Usage Last 7 Days*
- Campaign
  - ◊ Campaign Call Down*
  - ◊ Campaign Member
  - ◊ Campaign Member Analysis*
  - ◊ Campaigns with Influenced Opportunities

- Contract
  - ◊ Contract History
  - ◊ Order History
- Customer Support
  - ◊ Case History
  - ◊ Self Service Usage
  - ◊ Solution History
- Forecasts
  - ◊ Customizable Forecasting: Forecast History
  - ◊ Customizable Forecasting: Forecast Summary
  - ◊ Customizable Forecasting: Opportunity Forecasts
  - ◊ Forecast History
  - ◊ Forecasts
  - ◊ Quota versus Actual*
- Lead
  - ◊ Lead All
  - ◊ Lead History
  - ◊ Lead Status*
- Opportunity
  - ◊ Opportunities with Contact Roles and Products
  - ◊ Opportunities with Opportunity Teams and Products
  - ◊ Opportunity Field History
- Price Books, Products and Assets
  - ◊ Assets without Products*

See Also:

Combine Different Types of Information in a Joined Report
Choose a Report Type
Change the Principal Report Type
Combine Different Types of Information in a Joined Report
Build a Report From a Template

Custom Summary Formulas with Joined Reports

Two types of custom summary formulas are available with joined reports: standard and cross-block.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

Standard Custom Summary Formulas

Standard custom summary formulas apply to one report type, and can be added to blocks that are based on that report type only. For example, a summary formula created for the Cases report type can only be applied to Cases blocks. Custom summary formulas in joined reports support the same data formats, formula options, functions, and calculation display locations as they do with summary and matrix reports.

Keep the following in mind when working with custom summary formulas in joined reports.

- The formulas aren't automatically added to the report when you create them. To add a formula, drag it to a block with the same report type.
- When you add custom summary formulas to a block, they appear to the right of the standard fields in the order in which you added them to the block. If you also add cross-block custom summary formulas, they appear to the right of the standard ones.
- The results of custom summary formulas are affected by the filter options applied to the blocks they're included in. As a result, the same formula can yield different results in different blocks.
- You can add up to 10 custom summary formulas to each block in a joined report. A joined report can have a total of 50 custom summary formulas.
- Each custom summary formula must have a unique name. However, standard and cross-block custom summary formulas can have the same name.
- Custom summary formula names can't include brackets ("[" or "]").

Cross-Block Custom Summary Formulas

Cross-block custom summary formulas let you calculate values across multiple blocks in a joined report. For example, you can use a cross-block formula to calculate the ratio of open to closed opportunities for an account or the ratio of closed pipeline deals to sales targets.

Building a cross-block formula is similar to creating a standard one. The same data formats, formula options, functions, and calculation display locations are available. The formula syntax is also similar, except that block information is also included. For example, when calculating the ratio of opportunities to cases for each account, the formula also includes the block title: `[Opportunities block 1]RowCount / [Cases block 2]RowCount`. Note that if you omit block title, you see an error message when you check formula syntax or save the formula.

Keep the following in mind when working with cross-block custom summary formulas.

- You can add a cross-block formula to any block in the report.
- Cross-block formulas aren't automatically added to the report when you create them. To add a formula, drag it to a block.
- When you add cross-block formulas to a block, they appear to the right of standard ones in the order in which you add them to the block.
- The results of cross-block formulas are affected by the filter options applied to the blocks in the report. As a result, a cross-block formula can yield different results when you change filter options.
- Each joined report can have up to 10 cross-block custom summary formulas.
- Deleting a block that's used in a cross-block formula also deletes the formula from both the Fields pane and any remaining blocks containing it.
- Each cross block formula must have a unique name. However, standard and cross-block custom summary formulas can have the same name.

- Cross-block formula names can't include brackets ("[" or "]").

See Also:

Combine Different Types of Information in a Joined Report
Build a Custom Summary Formula
Get the Most Out of Custom Summary Formulas
Joined Report Examples
Build a Custom Summary Formula for a Joined Report

Build a Custom Summary Formula for a Joined Report

You can add standard or cross-block custom summary formulas for joined reports to calculate additional totals based on the numeric fields available in the report.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Use one of these options to access the Add Summary Formula overlay from the Fields pane.

Option	Description
To create a standard custom summary formula	Go to the report type category, and double-click **Add Formula**
To create a cross-block custom summary formula	Go to the Common category and double-click **Add Cross Block Formula**

2. Enter a name for the formula as you want it to appear in the report, and optionally a description.
   The name must be unique.
3. From the `Format` drop-down list, select the appropriate data type for your formula based on the output of your calculation.
4. From the `Decimal Places` drop-down, select the number of decimal places to display for currency, number, or percent data types. This setting is ignored for currency fields in multicurrency organizations. Instead, the `Decimal Places` for your currency setting apply.
5. Set the `Where will this formula be displayed?` option.
   The calculated value displays in the report block at either the Grand Total or the global grouping level, depending on which you select. To display the formula calculation at every level, including the Grand Total, select `All summary levels`. Optionally you can select to show the calculation at a global grouping level. You can have three global groupings in a joined report. The groupings apply across all blocks.

6. Build your formula:
   a. Select one of the fields listed in the **Summary Fields** drop-down list. This field's value is used in your formula.
      When creating a cross-block formula, the fields are grouped by block. You can also use Quick Find to search for a field.
      When creating a single-report type formula, the list displays numeric fields available for the report type.
   b. Select the kind of summary type to use in your formula. This option is not available for `Record Count`.

Summary Type	Description
Sum	The summary value of data in a field or grouping of fields.
Largest Value	The largest value of data in a field or grouping of fields.
Smallest Value	The smallest value of data in a field or grouping of fields.
Average	The average of data in a field or grouping of fields.

   c. Click **Operators** to add operators to your formula.
   d. Select the function category (All, Logical, Math, or Summary), choose the function you want to use in your formula, and click **Insert**.
   e. Repeat these steps as necessary.
7. Click **Check Syntax** to see if your formula contains errors. Errors are highlighted by the cursor.
8. Click **OK**. Your formula isn't saved until you save the report.

See Also:

Combine Different Types of Information in a Joined Report
Work with Formulas in Report Builder
Custom Summary Formulas with Joined Reports
Get the Most Out of Custom Summary Formulas
Joined Report Examples

Work with Blocks

Blocks let you create different views of the information contained in a joined report.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

See Also:

[Combine Different Types of Information in a Joined Report](#)
[Add a Block to a Joined Report](#)
[Reorder Blocks](#)
[Rename a Block](#)
[Show and Hide the Record Count for a Block](#)
[Delete a Block](#)
[Run a Joined Report](#)
[Combine Different Types of Information in a Joined Report](#)

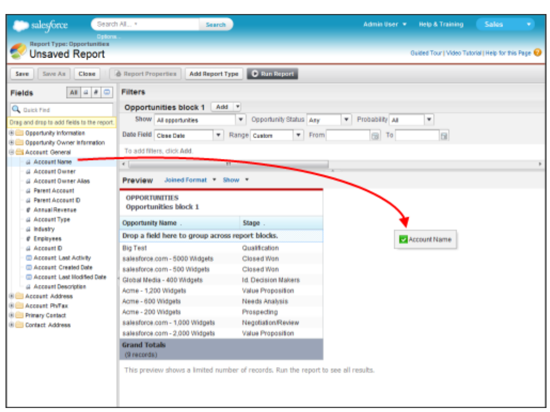
Add a Block to a Joined Report

Adding blocks to joined reports lets you create multiple views of the data included in a single report.

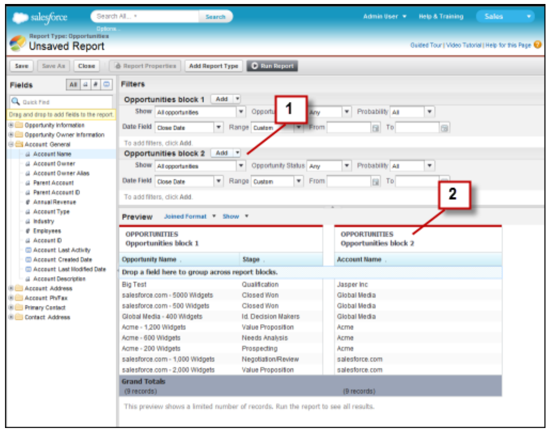
Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Click and hold a field from the Fields pane, then drag it to the empty area of the Preview pane.



2. Drop the field to create the block.



When you've added the block, notice that standard and field filters for the additional block are added to the Filters pane (1). Also, the new block appears in the Preview pane (2).

To delete a block, click in the block header, then click **Remove Block**. Or just drag the block to the Fields pane.

Keep the following in mind when working with blocks.

- Adding a new report type to a joined report also adds a new block.
- You must choose a field from a report type category when creating a block. You can't use a field from the Common category. For example, if your report contains both the Opportunities and the Cases report types, choosing a field from the Opportunities category creates a new Opportunities block, while choosing a field from the Cases category creates a new Cases block.

See Also:

Work with Blocks
Add a Report Type to a Joined Report
Delete a Block
Build a Custom Summary Formula for a Joined Report
Work with Blocks
Combine Different Types of Information in a Joined Report

Reorder Blocks

You can reorder blocks in a joined reports. Reordering blocks affects the report's appearance but doesn't affect the data in the blocks.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

When you reorder blocks, block numbers don't change. For example, if you have a report containing three blocks, and you move block 1 to a new position to the right of block 3, the blocks now display as block 2, block 3, and block 1. You should rename the blocks to avoid confusion.

When reordering a block, you move it to either the left or right of an existing block. You can’t drag it to an empty area in the Preview pane.

To reorder a block:

- In the Preview pane, drag the block to either the left or right side of an existing block.
  A blue bar beside the block indicates an acceptable drop location.

See Also:

Work with Blocks
Rename a Block
Work with Blocks

Rename a Block

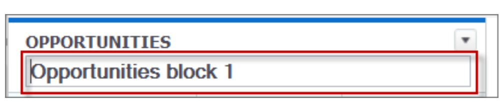
You can rename blocks to provide more user-friendly descriptions of the information they contain.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

When you add a block to a joined report, it’s named automatically based on the report type and the number of blocks in the report. For example, if your report contains two blocks and you add a new block that’s based on the Opportunities report type, it’s named Opportunities block 3.

1. Click the block’s name.
   The name now appears in an editable text box.



2. Enter the new name.

3. Press Enter or click outside the block to apply the name.

See Also:

Work with Blocks
Work with Blocks
Combine Different Types of Information in a Joined Report

Show and Hide the Record Count for a Block

You can choose to show or hide the number of records, or *record count*, for each block in a joined report. By default, record count is displayed for each block in the report builder and on the run reports page.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

You can hide or show record count two ways.

- Click the arrow in the block header ( ) to display the block menu. The check mark beside the **Record Count** menu item shows that record count is enabled for the block. Click **Record Count** to toggle between showing and hiding the count.
- When you've hidden report details, position the cursor over the Record Count column to display an arrow ( ). Click the arrow, and select **Remove Column**. To display record count again, click the arrow in the block header and select **Record Count**.

Note: If you haven't summarized any rows in your report blocks and have also hidden both details for the report and row counts for all blocks, your blocks will be hidden on the run reports page. To display the blocks, choose **Show Details** from the run reports page or the report builder.

See Also:

Work with Blocks
Run a Joined Report
Show and Hide Report Details
Use a Summary Function in a Report Formula

Delete a Block

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

There are two ways to delete a block from a joined report.

- Click the arrow in the block header (▾) to display the block menu, then click **Remove Block**.
- Click and hold in the block header, and drag the block to the Fields pane.

See Also:

Work with Blocks
Work with Blocks
Combine Different Types of Information in a Joined Report

Joined Report Examples

Creating a sales rep performance scorecard, reviewing support cases by status, and predicting your opportunity pipeline are some examples of what you can do with joined reports.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To run reports:	"Run Reports"
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

This topic provides examples of the types of reporting you can do with joined reports.

Creating a Sales Rep Performance Scorecard

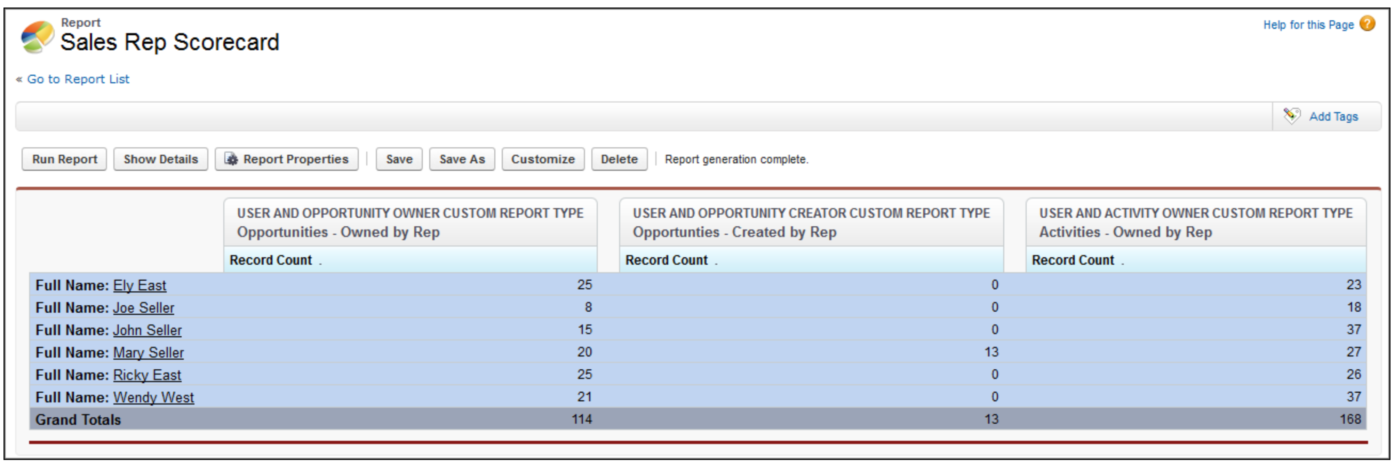
A sales rep scorecard lets your sales management team understand the performance and actions of your organization's sales reps. To create it, you need to have three separate custom report types, each of which creates a relationship between User (as the primary object) and one of the following three objects: Opportunity Owner, Opportunity Creator, and Activity Owner.

Note that, in this example, we've named the custom report types `User and Opportunity Owner Custom Report`, `User and Opportunity Creator Custom Report`, and `User and Activity Owner Custom Report`.

Start by creating a new custom report based on the User and Opportunity Owner custom report type, and then add the User and Opportunity Creator and User and Activity owner custom report types as two additional blocks. Then, group by Sales Rep (opportunity owner) and set the filters as described in the procedure.

To create the report:

1. Create a new report, selecting `User and Opportunity Owner Custom Report` as the report type.
2. Select `Joined` from the **Format** drop-down.
3. Click **Add Report Type**.
4. Select `User and Opportunity Creator Custom Report`.
5. Click **Add Report Type** again, and choose `User and Activity Owner Custom Report`.
6. Group the blocks by `Full Name`.
7. Add additional fields and filters to the report as needed. For example, you might want to change the date filters to focus on rep performance during a particular time frame. Or, to make sure that only sales people are included as opportunity owners, create a filter on the `Role: Name` filter limit your results to users with "Sales" in their roles.
8. Optionally, provide names for the blocks.
9. Click **Save** or **Run Report**.



Reviewing Support Cases by Status

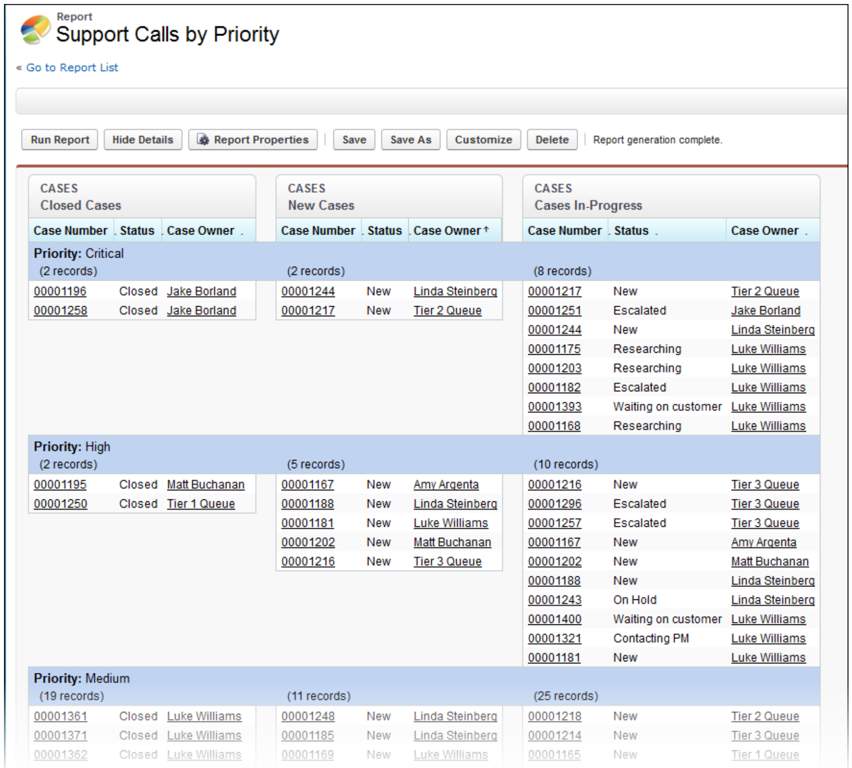
You can also create a report comparing the number of support cases that are new, closed, or in-progress by priority. The report contains a single standard report type: Cases. First, create the report, add three blocks to the report, filter each block by the appropriate status, and then use the `Priority` field for grouping.

To create the report:

1. Create a new report, selecting `Cases` as the report type.
2. Select `Joined` from the **Format** drop-down.
3. Remove unwanted fields by dragging them to the Fields pane.
4. Create three blocks, each containing the `Case Number` and `Status` and, optionally, `Case Owner` fields.
5. For each block, filter on all cases. Then, filter each of the blocks by `Status` as follows:

    - Block 1: `Status equals Closed`
    - Block 2: `Status equals New`
    - Block 3: `Status not equal to Closed, New, Closed in Portal, Closed — First Call`

6. Group the blocks by `Priority`.
7. Optionally, rename the blocks.
8. Click **Save** or **Run Report**.



Predicting Opportunity Pipeline

Using cross-block custom summary formulas, you can create a report that predicts future opportunity revenue based on your sales reps' past performance. Create a report based on the Opportunities standard report type, add three blocks to the report, filter each block by the appropriate status, and then create a formula that uses fields from different blocks.

To create the report:

1. Create a new joined report, selecting `Opportunities` as the report type.
2. Remove unwanted fields by dragging them to the Fields pane.
3. Create three blocks, each containing the `Opportunity Name`, `Account Name` and `Amount` fields.
4. For each block, show `All Opportunities`. Then, filter each block.

Block	Filters

Block 1	`Opportunity Status equals Closed`
	`Date Field equals Close Date`
	`Range equals Current and Previous FY`
	`Stage equals Closed Lost`

Block 2	`Opportunity Status equals Closed Won` `Date Field equals Close Date`

Block	Filters
	`Range equals Current and Previous FY`

Block 3	`Date Field equals Close Date`
	`Range equals Next Month`
	`Opportunity Status equals Open`

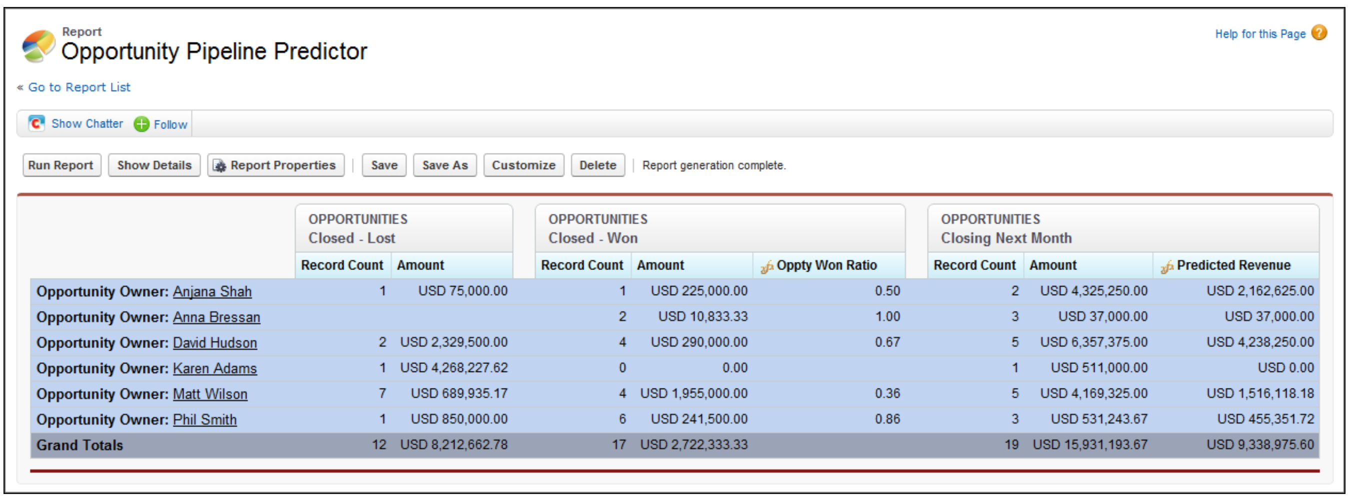
5. Group the blocks by `Opportunity Owner`.
6. Rename the blocks. For example, "Closed — Won", "Close — Lost", and "Closing Next Month".
7. Create a cross-block custom summary formula that predicts upcoming revenue based on past sales rep performance:

```
[Closing Next Month]AMOUNT:SUM*([Closed - Won]RowCount/([Closed -
                                 Lost]RowCount+[Closed - Won]RowCount))
```

8. Add the formula to one or more of the blocks.
9. Optionally, add a cross-block custom summary formula that calculates the win ratio of each sales rep:

```
[Closed - Won]RowCount/([Closed - Lost]RowCount+[Closed - Won]RowCount)
```

10. Click **Save** or **Run Report**.



	OPPORTUNITIES Closed - Lost		OPPORTUNITIES Closed - Won			OPPORTUNITIES Closing Next Month		
	Record Count	Amount	Record Count	Amount	Oppty Won Ratio	Record Count	Amount	Predicted Revenue
Opportunity Owner: Anjana Shah	1	USD 75,000.00	1	USD 225,000.00	0.50	2	USD 4,325,250.00	USD 2,162,625.00
Opportunity Owner: Anna Bressan			2	USD 10,833.33	1.00	3	USD 37,000.00	USD 37,000.00
Opportunity Owner: David Hudson	2	USD 2,329,500.00	4	USD 290,000.00	0.67	5	USD 6,357,375.00	USD 4,238,250.00
Opportunity Owner: Karen Adams	1	USD 4,268,227.62	0	0.00		1	USD 511,000.00	USD 0.00
Opportunity Owner: Matt Wilson	7	USD 689,935.17	4	USD 1,955,000.00	0.36	5	USD 4,169,325.00	USD 1,516,118.18
Opportunity Owner: Phil Smith	1	USD 850,000.00	6	USD 241,500.00	0.86	3	USD 531,243.67	USD 455,351.72
Grand Totals	12	USD 8,212,662.78	17	USD 2,722,333.33		19	USD 15,931,193.67	USD 9,338,975.60

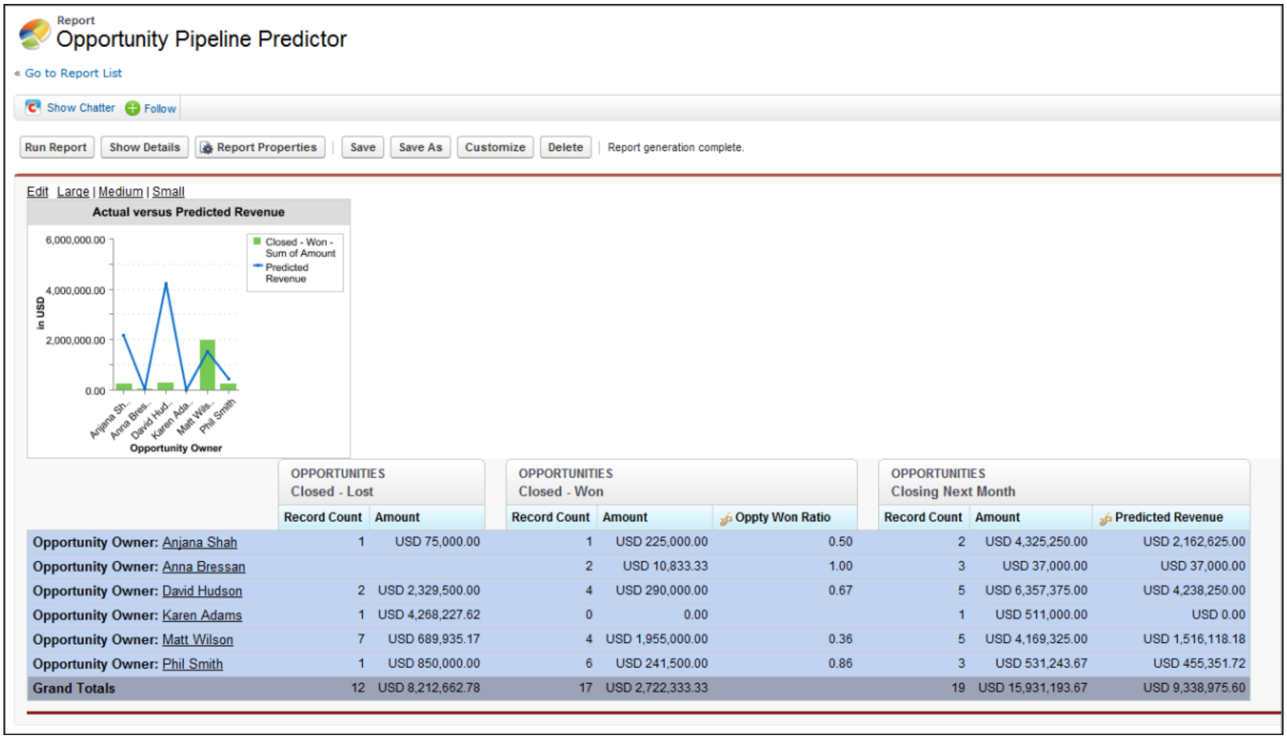
Adding a Chart to the Opportunity Pipeline Predictor Report

You can include a chart with a joined report to provide a visual representation of the data. For example, you can add a chart to the Opportunity Pipeline Predictor report that shows actual versus predicted revenue.

To add the chart:

1. Create the Predicting Opportunity Pipeline report.
2. Click **Add Chart**.
3. For the Y-axis, select `Closed — Won — Sum of Amount`.
4. Select **Plot additional values**.
5. Select `Line` for the Display option, and `Predicted Revenue` as the Value.
6. Click the Formatting tab, and enter `Actual versus Predicted Revenue` as the chart title.

7. Click **OK**.
8. Click **Save** or **Run Report**.



	OPPORTUNITIES Closed - Lost		OPPORTUNITIES Closed - Won			OPPORTUNITIES Closing Next Month		
	Record Count	Amount	Record Count	Amount	Oppty Won Ratio	Record Count	Amount	Predicted Revenue
Opportunity Owner: Anjana Shah	1	USD 75,000.00	1	USD 225,000.00	0.50	2	USD 4,325,250.00	USD 2,162,625.00
Opportunity Owner: Anna Bressan			2	USD 10,833.33	1.00	3	USD 37,000.00	USD 37,000.00
Opportunity Owner: David Hudson	2	USD 2,329,500.00	4	USD 290,000.00	0.67	5	USD 6,357,375.00	USD 4,238,250.00
Opportunity Owner: Karen Adams	1	USD 4,268,227.62	0	0.00		1	USD 511,000.00	USD 0.00
Opportunity Owner: Matt Wilson	7	USD 689,935.17	4	USD 1,955,000.00	0.36	5	USD 4,169,325.00	USD 1,516,118.18
Opportunity Owner: Phil Smith	1	USD 850,000.00	6	USD 241,500.00	0.86	3	USD 531,243.67	USD 455,351.72
Grand Totals	12	USD 8,212,662.78	17	USD 2,722,333.33		19	USD 15,931,193.67	USD 9,338,975.60

See Also:

Combine Different Types of Information in a Joined Report
Add a Chart to a Report
Custom Summary Formulas with Joined Reports
How Joined Reports Work
Run a Joined Report
Work with Blocks
Combine Different Types of Information in a Joined Report

Communicate Your Report Data Effectively

A report produces information in the form of a table. You can set up that table to help people scan quickly for the information they need. You can also add a graph to help users understand the data visually, and you can display the report's data on a dashboard.

See Also:

Gather Data with Reports
Show Report Data in Tables
Show Report Data Graphically
Deliver Your Report
Share Reports and Dashboards
Report on Salesforce Data with Excel
Report on Historical Data with Analytic Snapshots
Upgrade Report Builder
Troubleshoot Reports
Show Report Data Graphically
Show Report Data in Tables

Show Report Data in Tables

To help readers scan for data easily, try hiding details and ranges, limiting the number of results shown, and highlighting with color. You can also show your table in a dashboard component.

See Also:

Communicate Your Report Data Effectively
Show and Hide Report Details
Highlight Data Ranges
Use a Tabular Report in a Dashboard
Limit Report Results
Highlight Data Ranges
Limit Report Results
Show and Hide Report Details
Use a Tabular Report in a Dashboard

Show and Hide Report Details

You can show or hide report details from either the run reports page or the report builder. When you hide details, individual records don't display in the report. Groupings, summary formulas, and record counts remain visible.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To run reports:	"Run Reports"
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

- From the run reports page, click **Hide Details** to hide individual records. Click **Show Details** to show all records.
- From the report builder, click **Show** > **Details**. A check mark beside the **Details** menu item means that details are displayed. Click **Details** to toggle between showing or hiding records.

See Also:

Show Report Data in Tables
Show and Hide the Record Count for a Block
Build a New Report
Combine Different Types of Information in a Joined Report

Highlight Data Ranges

Highlight field values on summary or matrix reports based on ranges and colors you specify. To enable conditional highlighting, your report must contain at least one summary field or custom summary formula.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

To set conditional highlighting, click **Show** > **Conditional Highlighting** in report builder, then set the breakpoint values and their range colors as follows:

Field	Description
`Summary`	Choose a summary field whose number ranges you want represented by colors.
`Low Color`	Select a color to represent data that falls below the `Low Breakpoint` value.
`Low Breakpoint`	The number that acts as the threshold between the `Low Color` and the `Mid Color`. Values that are exactly the same as the `Low Breakpoint` value are shown as the `Mid Color`.
`Mid Color`	Select a color to represent data that falls between the `Low Breakpoint` and `High Breakpoint` values.

Field	Description
`High Breakpoint`	The number that acts as the threshold between the `Mid Color` and the `High Color`. Values that are exactly the same as the `High Breakpoint` value are shown as the `High Color`.
`High Color`	Select a color to represent data that falls above the `High Breakpoint` value.

See Also:

Show Report Data in Tables
Build a New Report

Use a Tabular Report in a Dashboard

You can use a tabular report as the source report for a dashboard table or chart component, if you limit the number of rows it returns.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

1. Click **Add** > **Row Limit**.
2. Set the `Row Limit` to `10`, `25`, or `Custom`. If you choose custom enter a number between one and 99.
3. Set the `Sort By` and sort order options. If you chose **Limit Rows by this Field** for a column, these options are already set.
4. Click **OK**.
5. Click **Dashboard Settings** in the toolbar.
6. Choose a `Name` and `Value` to use in dashboard tables and charts. Tables show both name and value. Charts are grouped by name.
7. Click **OK**. You can now use this tabular report as the source report for a dashboard component.

Tip: When you create a dashboard component to display your tabular report, you can use the dashboard component editor to override the settings you chose in **Dashboard Settings**.

See Also:

Show Report Data in Tables
Share Insights with Dashboards
Filter Your Report Data

Limit Report Results

Set limits to the scope of your report to avoid processing too many records. The built-in choices for limiting your results vary according to the object you are reporting on.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

- To see a collapsed view of a report showing only the headings, subtotals, and total in report builder, deselect **Show** > **Details**.

  On the report run page, click **Hide Details** or **Show Details** at the top of the report.
- To filter by a field, click **Add** > **Field Filter**. With tabular, summary, and matrix reports, you can drag a field from the Fields pane to the Filters pane to add a report filter.
- Cross filters work like ordinary filters, but they have some special characteristics of their own. To add one, click **Add** > **Cross Filter**.
- In Professional, Enterprise, Unlimited, and Developer edition organizations, the **Hierarchy** links let you browse report results based on the role or territory hierarchies.
- If your organization uses divisions to segment data and you have the "Affected by Divisions" permission, use the Division drop-down list to include records in just one division or all divisions. Select `Current` to show records in your current working division. Reports that are already scoped (such as My Cases or My team's accounts) include records in all divisions, and you can't further limit them to a specific division. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
- You can set the maximum number of records to display in a tabular report by clicking **Add** > **Row Limit** in report builder. Set the number of rows, then choose a field to sort by, and the sort order. Limiting rows on a tabular report allows you to use it as a source report for dashboard table and chart components.

  The `Row Limit` option on tabular reports shows only fields from the primary object on reports created from custom report types where object A may or may not have object B. For example, in an accounts with or without contacts report, only fields from accounts are shown. Fields from objects after a may-or-may-not association on custom report types aren't shown. For example, in an accounts with contacts with or without cases report, only fields from accounts and contacts are available to use. If you change the report format, **Row Limit** settings are lost.

Note: Only the first 255 characters in a custom text field count for filtering purposes. For example, if you add a field filter to find opportunities where the custom text field *`Customer notes`* includes the word "phone," but "phone" appears after the 255th character in the field, the filter will not find that record. In standard text fields, all characters count, regardless of the length of the field.

See Also:

Show Report Data in Tables
The Report Run Page
Report on Related Objects with Cross Filters

Show Report Data Graphically

To help readers understand your data quickly and easily, show the data in chart form. Charts appear just above the report table. They can help users get a feel for the data before they delve into the details. Use line charts to track changes over time, or a bar or pie chart to compare values at a point in time. Charts can also appear in dashboard components.

See Also:

Communicate Your Report Data Effectively
Add a Chart to a Report
Chart Properties
Present Data Effectively with Charts
Show Different Data Sets in One Chart
Combination Chart Examples
Chart Formatting Options
Present Data Effectively with Charts
Add a Chart to a Report
Chart Properties
Combination Chart Examples
Show Different Data Sets in One Chart

Add a Chart to a Report

Add a chart to give users a visual way to understand the data in your report.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

Note: Your report must have at least one grouping before you can add a chart.

To add or edit a chart:

1. Click **Add Chart** in report builder. For existing charts, click **Edit Chart**.
2. Select a chart type.
3. Enter the appropriate settings on the Chart Data tab for the chart type you selected.
4. Enter the appropriate settings on the Formatting tab.
5. Click **OK**.

See Also:

Show Report Data Graphically
Chart Types
Present Data Effectively with Charts
Build a New Report

Chart Properties

You can add a chart to any standard or custom summary or matrix report. The chart properties specify the data that appears in the chart, its labels and colors, and any conditional highlighting you apply.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports"

Note: This topic only applies if you're not using report builder. *Report builder* is a visual editor for reports.

To customize chart properties, click **Add Chart** or **Edit Chart** in any matrix or summary report, and use the fields on the Chart Data and Formatting tabs.

See Present Data Effectively with Charts on page 145 for limits, considerations, and tips.

Chart Data Settings

Control the data that appears in your chart with these options.

Field	Description
`Chart Type`	Select the type of chart to use when representing the data in your report. The chart type that you choose determines which chart properties are available to set.

Field	Description
`X-Axis` and `Y-Axis`	Choose what values to display on the axes of your chart. Depending on the chart type, axis values can be record count, summary fields, or groupings defined in the report. **Note:** If the Y-axis corresponds to a custom summary formula that has the `Where Will this Formula Be Displayed?` option set to a grouping level other than `All summary levels`, then the X-axis and Groupings selection must correspond to that custom summary formula's grouping level.
`Combination Chart`	Select this option to plot additional values on this chart. The chart type you chose must allow combination charts.
`Groupings`	Choose how to group information on your chart. You can only pick from groupings defined in the report. For bar and column charts, click an icon to select the grouping display: side-by-side, stacked, or stacked to 100%. For either single or grouped line charts, you can select `Cumulative`.
`Values`	Choose what to display as values for your pie, donut, or funnel chart.
`Wedges`	Choose what to display as wedges for your pie or donut chart.
`Segments`	Choose what to display as segments for your funnel chart.

Chart Presentation

Control the appearance and behavior of your chart using these options.

Field	Description
`Chart Title`	Enter a name for the chart.
`Title Color`	Select the color for the text of your chart title.
`Title Size`	Select the font size for the text of your chart title. The maximum size is 18. Larger values are shown at 18 points.
`Text Color`	Select a color for all the text and labels in your chart.
`Text Size`	Select a font size for all the text and labels in your chart. The maximum size is 18. Larger values are shown at 18 points.
`Background Fade`	Choose a direction for a gradient color background. Also select a `Start Color` and `End Color` for the gradient. Use white for both if you do not want a background design.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Combine Small Groups into “Others”`	Combine all groups less than or equal to 3% of the total into a single “Others” wedge or segment. Deselect to show all values individually on the chart. This only applies to pie, donut, and funnel charts. This option is on by default for pie and donut charts, and off for funnel.
`X- or Y-Axis Range`	Choose a manual or automatic axis range for bar, line, or column charts. If you choose manual, enter numbers for the minimum and maximum axis values to be displayed. If there are data points outside the range that you set, the axis automatically extends to include those values when you generate the chart.
`Show Axis Labels`	Display labels for each axis of your chart. This only applies to bar and line charts.
`Show Labels`	Display labels for your pie, donut, or funnel chart.

Field	Description
Show Group %	Display the percentage value for each group in the chart.
Show X- or Y-Axis Values	Display the values of individual records or groups on the chart axis. This only applies to certain horizontal bar and vertical column charts.
Show Values	Display the values of individual records or groups on the chart. This only applies to certain chart types.
Show Wedge %	Display the percentage value for each wedge of pie and donut charts.
Show Total	Display the total value for the donut chart.
Show Segment %	Display the percentage value for each segment of funnel charts.
Show Details on Hover	Display values, labels, and percentages when hovering over charts. Hover details depend on chart type. Percentages apply to pie, donut, and funnel charts only. Hover is disabled when viewing charts that have more than 200 data points.
Chart Size	Select a size for the chart, from Tiny to Extra Large.
Chart Position	Place the chart above or below your report.

Conditional Highlighting

Highlight field values on summary or matrix reports based on ranges and colors you specify. To enable conditional highlighting, your report must contain at least one summary field or custom summary formula.

Field	Description
Summary	Choose a summary field whose number ranges you want represented by colors.
Low Color	Select a color to represent data that falls below the `Low Breakpoint` value.
Low Breakpoint	The number that acts as the threshold between the `Low Color` and the `Mid Color`. Values that are exactly the same as the `Low Breakpoint` value are shown as the `Mid Color`.
Mid Color	Select a color to represent data that falls between the `Low Breakpoint` and `High Breakpoint` values.
High Breakpoint	The number that acts as the threshold between the `Mid Color` and the `High Color`. Values that are exactly the same as the `High Breakpoint` value are shown as the `High Color`.
High Color	Select a color to represent data that falls above the `High Breakpoint` value.

See Also:

Show Report Data Graphically
Chart Types
The Report Builder Screen

Present Data Effectively with Charts

When you add a chart to a report, things like negative values, very large or small numbers, custom summary formulas, and field-level security can affect the charts' appearance. Switching the report format and changing groupings and blocks also affects charts.

Available in: **All** editions except **Database.com**

- You can't have more than 250 groups or 4,000 values in a chart. If you see an error message saying that your chart has too many groups or values to plot, adjust the report filters to reduce the number. In combination charts, all groups and values count against the total.
- If you lose access to a field used in a chart, another field may be used in its place. If no other fields are available, record count is used.
- Decimal-place precision on charts is not customizable. Numeric and currency values round to two decimal places. Percentage values round to one decimal place.
- If numeric values are too large or too small, they are shown in scientific notation. For example, the number 5,750,000,000 is displayed as 5.75E9; -0.0000000061 is displayed as -6.1E-9.
- Negative values are displayed on all line charts and non-stacked bar and column charts. Negative values on pie, donut, funnel, and stacked charts are not displayed. Groupings containing negative values are displayed in the legend, and negative values are reflected in the calculation of all summary values, including the total for donut charts.
- When creating charts, don't group by a field on a child object then sum by a field on the parent object. It's not good practice. If you do this with a donut chart, the total shown may not match the sum of the wedges.
- Dashboard and report charts that display values from custom summary formulas display decimal places using your default currency setting instead of what you specified for the formula. For example, if the summary formula specifies zero decimal places, no decimal places appear in columns, but chart values show the number of decimal places specified for your default currency (usually two decimal places). This applies to currencies, numbers, and percentages.
- With joined reports, summary field names contain both the field name and the block name. For example, if you've summarized the Amount field in Block 1, it appears as `Block 1 — Sum of Amount` in the Chart Editor. A cross-block or standard custom summary formula contains the block name when the formula is included in multiple blocks.
- When a report already has a chart, changing the report format or removing blocks, groupings, or summary fields has impacts described in this table.

When you make this change ...	The effect is ...
Switch format from summary, matrix, or joined to tabular	All charts are removed from the report.
Switch format from summary to matrix	The first summary grouping becomes the first row grouping. The second becomes the first column grouping. The third becomes the second row grouping. The chart is unchanged.
Switch format from matrix to summary	The first row grouping becomes the first summary grouping. The second row grouping becomes the *third* summary grouping. The first column grouping becomes the *second* summary grouping. The second column grouping is removed. If the chart used the second column grouping, that grouping is replaced by the first available summary field that's not already used in the chart.

When you make this change ...	The effect is ...
Switch format from summary or matrix to joined	The existing report becomes the first block and the chart remains in the report. If the matrix report used the second column grouping, that grouping is replaced by the first available summary field that's not already used in the chart. If the summary or matrix report included a grouping from a bucket field, the grouping is replaced with the next available grouping not already used in the chart.
Switch format from joined to summary or matrix	The first block becomes the report, and groupings and the chart are preserved. If the chart in the joined version contained summary fields from the first block, they remain in the chart in the summary report. Summaries from other blocks are removed from the chart.
Remove a block containing a summary field from a joined report	The summary field is replaced with the next available summary field. If no additional summary fields are available, the original field is replaced with the record count from the first remaining block. Removing all blocks from a report removes the chart completely.
Remove a grouping used in the chart	The grouping is replaced with the next available grouping. If all groupings are removed, the chart is removed as well. Note that groupings can be removed automatically when you add a report type to a joined report or if a field becomes unavailable, for example as a result of field-level security.
Remove a summary field used in the chart (including custom and cross-block summaries)	The summary field is replaced with the next available summary field. If no additional summary fields are available, the field is replaced with the record count for either the report or the first block. Note that summary fields can be removed automatically, for example as a result of field-level security or when the report format changes.

See Also:

Show Report Data Graphically
Add a Chart to a Report
Chart Formatting Options
Show Different Data Sets in One Chart

Show Different Data Sets in One Chart

A *combination chart* plots multiple sets of data on a single chart. Each set of data is based on a different field, so values are easy to compare. You can also combine certain chart types to present data in different ways in a single chart.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

With combination charts, you can:

- Add a line to an existing line, vertical column, grouped vertical column, or stacked vertical column chart.
- Add a cumulative line to an existing line cumulative chart.
- Add up to three columns to a vertical column chart.
- Add up to three bars to a horizontal bar chart.

For example, if you are a sales manager, you might wish to see “Pipeline amount” as a line and “Number of open deals” as vertical bars, on the same chart.

1. Edit the chart for any summary or matrix report, or edit a dashboard component that displays a summary or matrix report.
2. Choose a chart type that allows combination charts:
   - Bar chart
   - Column chart
   - Grouped column chart
   - Stacked column chart
   - Line chart
   - Cumulative line chart
3. Select the **Plot additional values** checkbox. The chart preview updates as you configure your combination chart.
4. Select a `Value` to plot on the chart.
5. Choose a `Display` option. Available options differ based on your chart typ and whether you’re editing a chart or a dashboard component.
   - For columns or bars, click **Add Bar** or **Add Column** links to add up to three sets.
   - When adding a line to a vertical column chart, select **Use second axis** to show a separate axis for the added line on the right side of the column chart. A separate axis can be useful when the two values have different ranges or units.

     Note: Selecting **Use second axis** makes more values available in the `Value` drop-down list. Without this option, you can only pick from values of the same type as the primary Y-axis—for example, number, currency, or percentage. This option is only available for certain combination charts.
6. Once you've set up your report, click **Run Report** or **Save**.

Note:

- If you lose access to a field used in a chart, another field may be used in its place. If no other fields are available, record count is used.
- To show combination charts in a dashboard, use the `Use chart as defined in source report` option.

- Filtered drill-down doesn't work for combination charts in dashboards.

See Also:

Show Report Data Graphically
Chart Types
Add a Chart to a Report
Combination Chart Examples

Combination Chart Examples

Use a combination chart to show multiple values against a single axis range, show two chart types together, or compare two continuous summary values.

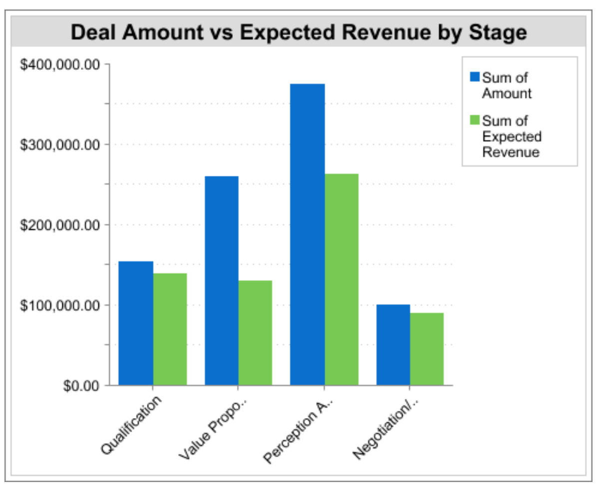
A *combination chart* plots multiple sets of data on a single chart.

Column-on-Column

Add columns to a column chart to show multiple values against a single axis range.

To create the chart in this example, choose the Vertical Column chart type, set the opportunity sum of amount as the `Y-Axis`, stage as the `X-Axis`, and use the **Plot additional values** option to add the sum of expected revenue as a column.

You can quickly compare the actual values against the expected values for each stage.

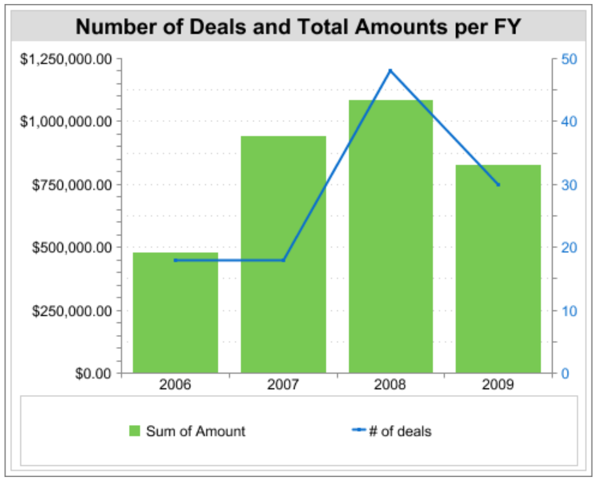


Line-on-Column

Add a line to a column chart to show two chart types together. Using a second axis allows you to add different types of values to the chart.

To create the chart in this example, choose the Vertical Column chart type, set the opportunity sum of amount as the `Y-Axis`, fiscal year as the `X-Axis`, and use the **Plot additional values** option to add the number of deals as a line. Summary values of different types won't be available in the `Values` drop-down list unless you select **Use second axis**.

You can see both the total amount and number of deals for each year on a single chart.

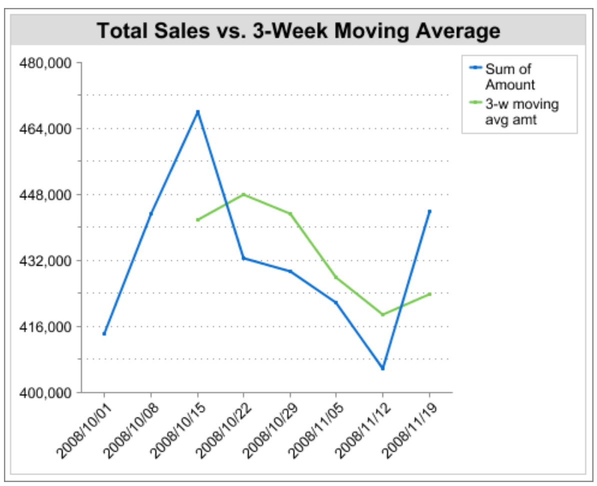


Line-on-Line

Add a line to a line chart to compare two continuous summary values.

To create the chart in this example, set up a custom summary formula to calculate a three-week moving average of opportunity amounts, then choose the Line chart type, set the opportunity sum of amount as the `Y-Axis`, date as the `X-Axis`, and use the **Plot additional values** option to add the calculated three-week moving average as a line.

You can compare sales against the moving average over time.



The custom summary formula used in this example is shown here:

```
(OppProductTrends__c.Amount__c:SUM+ PREVGROUPVAL(OppProductTrends__c.Amount__c:SUM,
OppProductTrends__c.as_of_date__c) + PREVGROUPVAL(OppProductTrends__c.Amount__c:SUM,
OppProductTrends__c.as_of_date__c,2))/3
```

See Also:

Show Report Data Graphically
Show Different Data Sets in One Chart

Chart Formatting Options

Control the appearance and behavior of your chart using these options.

Field	Description
`Chart Title`	Enter a name for the chart.
`Title Color`	Select the color for the text of your chart title.
`Title Size`	Select the font size for the text of your chart title. The maximum size is 18. Larger values are shown at 18 points.
`Text Color`	Select a color for all the text and labels in your chart.
`Text Size`	Select a font size for all the text and labels in your chart. The maximum size is 18. Larger values are shown at 18 points.
`Background Fade`	Choose a direction for a gradient color background. Also select a `Start Color` and `End Color` for the gradient. Use white for both if you do not want a background design.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Combine Small Groups into "Others"`	Combine all groups less than or equal to 3% of the total into a single "Others" wedge or segment. Deselect to show all values individually on the chart. This only applies to pie, donut, and funnel charts. This option is on by default for pie and donut charts, and off for funnel.
`X- or Y-Axis Range`	Choose a manual or automatic axis range for bar, line, or column charts. If you choose manual, enter numbers for the minimum and maximum axis values to be displayed. If there are data points outside the range that you set, the axis automatically extends to include those values when you generate the chart.
`Show Axis Labels`	Display labels for each axis of your chart. This only applies to bar and line charts.
`Show Labels`	Display labels for your pie, donut, or funnel chart.
`Show Group %`	Display the percentage value for each group in the chart.
`Show X- or Y-Axis Values`	Display the values of individual records or groups on the chart axis. This only applies to certain horizontal bar and vertical column charts.
`Show Values`	Display the values of individual records or groups on the chart. This only applies to certain chart types.
`Show Wedge %`	Display the percentage value for each wedge of pie and donut charts.
`Show Total`	Display the total value for the donut chart.
`Show Segment %`	Display the percentage value for each segment of funnel charts.
`Show Details on Hover`	Display values, labels, and percentages when hovering over charts. Hover details depend on chart type. Percentages apply to pie, donut, and funnel charts only. Hover is disabled when viewing charts that have more than 200 data points.
`Chart Size`	Select a size for the chart, from Tiny to Extra Large.

Field	Description
`Chart Position`	Place the chart above or below your report.

See Also:

Show Report Data Graphically
Add a Chart to a Report

Deliver Your Report

To get the information in your report to the people who need it, you can share the report's URL, make the report available for Chatter feeds, or export the data to another tool, such as Excel. You can also set the report to run on a schedule so that viewers always have the latest information.

Administrators, or users with the "Manage Public Reports" and "Create and Customize Reports" permissions, can create custom reports that all users can view. They can also organize reports by creating custom report folders and configuring which groups of users have access to them.

To make a report public, run the report and click **Save As**. Give the report a name and choose a public report folder.

See Also:

Communicate Your Report Data Effectively
Export Report Data
Schedule Reports
Export a Report
Schedule a Report for Refresh

Export Report Data

You can export your report data to a reusable format when you need to work with it in a dedicated tool, such as Microsoft Excel.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To export reports:	"Export Reports"

Note: For security purposes, Salesforce may require users to pass a CAPTCHA user verification test to export data from their organization. This simple text-entry test prevents malicious programs from accessing your organization's data. To pass the test, users must correctly type the two words displayed on the overlay into the overlay's text box field. Note that the words entered into the text box field must be separated by a space.

See Also:

Deliver Your Report
Export a Report
Locale Settings for Exporting Report Data
Export Reports in the Background

Export a Report

From the Reports tab, you can export data for a selected report to Excel or in comma-delimited format.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To export reports:	"Export Reports"

1. On the Reports tab for a selected report, click > **Export**.
   - If you set the "Do not save encrypted pages to disk" option in Internet Explorer, you will not be able to open your report online in Excel. You must save the exported report to your computer, and then open it in Excel. To change this setting in Internet Explorer, deselect "Do not save encrypted pages to disk" under Internet options.
   - Reports in the joined format can't be exported, but you can choose a printable view.
2. Set the `Export File Encoding` for your language.
3. Set the `Export File Format` to Excel or comma delimited.
4. Click **Export**.
5. In your browser's dialog, choose to save the file.

   You can export up to 256 columns and 65,536 rows of data in one report.

See Also:

Export Report Data
Export Reports in the Background
Locale Settings for Exporting Report Data
Print a Report

Locale Settings for Exporting Report Data

Some tips on using the comma-delimited format and working with Excel when you export report data.

Available in: **All** editions except **Database.com**

Exporting in Comma Separated Value Format

When exporting reports in the comma-separated values (.csv) format, the locale settings on your user detail page determine the field separator (delimiter) included in the exported file. For example, if your locale setting is English (United States), the decimal separator is a period ("."), If your locale setting is French (France), the decimal separator is a comma (","). You can override the default separator for your locale by choosing Comma Delimited (non-locale) .csv from the `Export File Format` drop-down list.

Note that Excel does not display the field separator in .csv format. If you want to export reports to Excel in .csv format, we recommend that your locale setting in Salesforce match your Regional Options setting in Windows.

See Also:

Export Report Data
Export a Report
Print a Report

Export Reports in the Background

Export reports in the background so you can continue working in Salesforce without waiting for report results to display.

Available in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To export reports to the background:	"Background Report Export"
To view reports exported to the background by other users:	"Background Report Export" AND "View All Data"
To manage reports exported to the background by other users:	"Background Report Export" AND "Modify All Data"

Exporting reports to the background allows you to successfully run data-intensive reports, which would otherwise time out due to the large number of report results.

Note: Contact salesforce.com to activate this feature for your organization.

See Also:

Export Report Data
The Report Run Page
Create a Custom Report in Accessibility Mode
Create a Report
The Report Builder Screen
Report Run Page Options
Export a Report
Run a Report

Exporting Reports to the Background

To export a report to the background:

1. Create a custom report or run an existing report.
2. Click **Export Details** and choose **Run Background Export** from the drop-down button.

   When running an existing report, click this button to avoid waiting for report results to display.
3. Select a file encoding setting and a file format in which to export the report.
4. Choose how to save the report:
   - Click `Save revisions` to save any parameter changes you made to the report before exporting.

     Selecting this option overwrites the parameters of the original report.
   - Click `Save revisions to a copy` to create a new report before exporting. If you select this option, enter a name and description for the report, and choose a report folder in which to save the report parameters.

   Note: Only report parameters are saved in report folders for reports run in the background. To view report results, you must view report details from the background report exports list..
5. Click **Start Background Export**.

   After you start a background export of a report, the background report exports list displays.

   When your report has finished running and its results are ready for viewing, an email notification is sent to you. The email notification contains a link that you can click to view the report details, from which you can download the report results in CSV (comma-separated values) format. You can also download report results from the background report exports list by viewing report details and then clicking the **Click here to download file** link..

   Note: If commas are not appropriate for your locale, use a tab or other delimiter.

   In the unlikely event that a background export of a report fails, an email notification is sent to you. Reports exported to the background can fail for a number of reasons. For example, between the time you exported the report and the export process began, fields may have been deleted from the report, the report may have been deleted, or the status of the custom report type from which the report was created may have been changed to “In Development.”

Important:

- When a report exported to the background finishes running, it is available for viewing in the background report exports list for 48 hours. After 48 hours, the report is automatically deleted. Reports deleted from the background report exports list are permanently deleted and *not* sent to the Recycle Bin. Additionally, reports exported to the background run sequentially, one at a time. Therefore, the latest report exported to the background runs after all reports that were previously exported to the background finish running.
- You can export an unlimited number of reports to the background.
- If the report takes longer than 30 minutes to complete, Salesforce cancels the report. Try the following techniques to reduce the amount of data in your report:
  - Filter for your own records, rather than all records.
  - Limit the scope of the data to a specific date range.
  - Exclude unnecessary columns from your report.
  - Hide the report details.

View and Manage Reports in the Background

You can view and manage reports exported to run in the background from the background report exports list. To view the background report exports list, from Setup, click **Monitoring** > **Background Report Exports**.

From the background report exports list you can:

- View the details of a report exported to the background by clicking the name of a report in the `Job Name` column. These details include:
  - The name of the report
  - The status of the export
  - The folder in which the report's parameters are saved
  - A description of the report
  - The file extension of the report
  - The size of the report
  - The name of the user who submitted the report for export
  - The date and time the report was originally submitted for export

  Additionally, after a report exported to the background has finished running, you can click the **Click here to download file** link to download the report results in CSV (comma-separated values) format. You can only download data that you have permission to view.

  Note: For security purposes, Salesforce may require users to pass a CAPTCHA user verification test to export data from their organization. This simple text-entry test prevents malicious programs from accessing your organization's data. To pass the test, users must correctly type the two words displayed on the overlay into the overlay's text box field. Note that the words entered into the text box field must be separated by a space.

  If comma delimiters are not appropriate for your locale, select a tab or other delimiter.
- Click **Cancel** or **Del** next to the name of a report to cancel a pending export or to delete a report from the background report exports list. Reports deleted from the background report exports list are permanently deleted and *not* sent to the Recycle Bin.

When a report exported to the background finishes running, it is available for viewing in the background report exports list for 48 hours. After 48 hours, the report is automatically deleted. Reports deleted from the background report exports list are permanently deleted and *not* sent to the Recycle Bin.

You can export an unlimited number of reports to the background. Additionally, reports exported to the background run sequentially, one at a time. Therefore, the latest report exported to the background runs after all reports that were previously exported to the background finish running.

- Click **Refresh List** to view any reports that have been exported to the background since you began viewing the background report exports list.

Schedule Reports

You can set up a report to run itself daily, weekly, or monthly and send the results automatically to the people who need to see them, so that you don't have to remember to log in and do it yourself.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To schedule reports:	"Schedule Reports"

Tips for Scheduling Reports (2:19 minutes)

See Also:

Deliver Your Report
Schedule a Report for Refresh
View a Report's Schedule
Manage a Report's Schedule
Change a Report's Schedule
Delete a Report's Schedule
Tips on Scheduling Reports
Schedule a Report for Refresh
Change a Report's Schedule
Delete a Report's Schedule
Manage a Report's Schedule
Tips on Scheduling Reports
View a Report's Schedule

Schedule a Report for Refresh

Schedule a report to run daily, weekly, or monthly. The report can be emailed automatically in HTML format to users in your organization.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To schedule reports:	"Schedule Reports"

Watch a Demo: Tips for Scheduling Reports (2:19 minutes)

1. On the Reports tab, click an existing report name.
2. Click **Schedule Future Runs...** from the **Run Report** drop-down.

   If you're creating a new report, you are asked to save the report with a name and in a folder before scheduling.
3. On the Schedule Report page, specify a **Running User** who has access to the folder where the report is stored.

   The access level of the running user determines what other users, including portal users, see when they receive the scheduled report run results. You need the "View All Data" permission to specify a running user other than yourself.

   Note: If the running user becomes inactive, the report is not run. The system administrator receives an email notification to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.

4. Select an email setting:

Select	To
`To me`	Send the report to your email address specified on your user profile.
`To me and/or others...`	Email the report to additional users.

   You can send reports only to email addresses included on Salesforce user records. When portal users receive emailed reports, they see the same data as the running user set in the report schedule. If you have information you'd rather not share, schedule the report to run with a portal user as the running user.

   Note: Portal users receive report and dashboard refresh email notifications when the `Allow Reports and Dashboards to Be Sent to Portal Users` option is enabled.

5. Set the frequency, duration, and time for running the report:
   - In the `Frequency` field, select `Daily`, `Weekly`, or `Monthly` and then refine the frequency criteria.
   - Using the `Start` and `End` fields, specify the dates during which you want to schedule the report. To enter the current date, click the link showing the date.
   - Next to `Preferred Start Time`, click **Find available options...** to choose a start time.

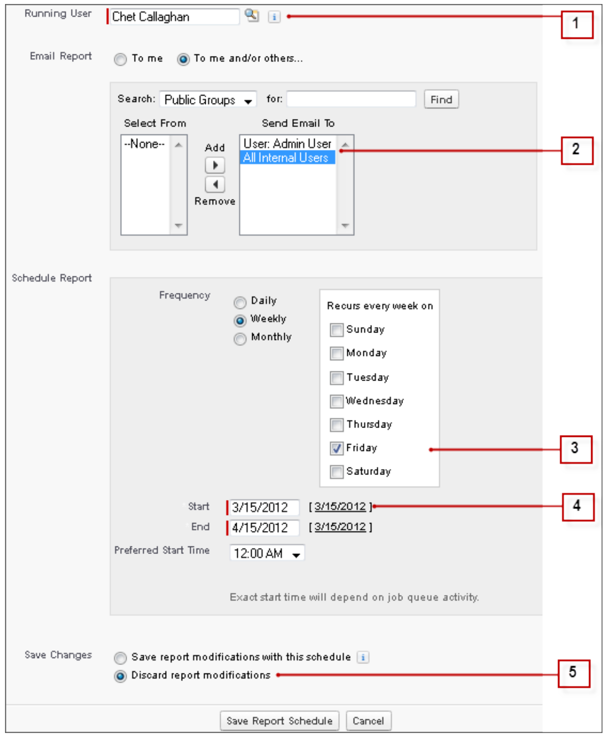
   Your preferred start time might not be available if other users have already selected that time to schedule a report.
6. Click **Save Report Schedule**. You can choose:

Choose	To
Save report modifications with this schedule	Save both the report schedule and changes you made to the report.
Discard report modifications	Save the schedule only. Changes you made to the report are discarded.

Report recipients can click the report name in emailed reports to log in to Salesforce and view the report directly.

Example

A report is scheduled to run every Friday at midnight, and its results are emailed to a selected group and user.



1. All users, including portal users, viewing the scheduled report see the report data that Sales Director Chet's access level allows.
2. Report run results are set to be emailed to a public user group called All Internal Users and the admin user.
3. The report is scheduled to run every Friday.
4. The report run is scheduled to start on the current date.
5. The schedule is saved without saving prior changes made to the report.

See Also:

Schedule Reports
Manage a Report's Schedule
Run a Report

View a Report's Schedule

View a report's schedule on the Schedule Report page or from the Reports tab. View all report schedules for the organization under Setup.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To schedule reports:	“Schedule Reports”
To view all scheduled report for the organization:	“View Setup and Configuration”

Tips for Scheduling Reports (2:19 minutes)

- To see the schedule for a report on the Reports tab, hover over ✔ in the schedule column.

  This shows the frequency and the date of the next run.

  Users without the “Schedule Reports” permission can't see the icon and information.
- To see a report’s run schedule on the Schedule Report page:
  1. Click a scheduled report name on the Reports tab.
  2. Click **Schedule Future Runs...** from the **Run Report** drop-down..
- To see all scheduled reports for your organization, from Setup, click **Monitoring** > **Scheduled Jobs** or **Jobs** > **Scheduled Jobs**.

  Only users with the “View Setup and Configuration” permission can view this information.

See Also:

Schedule Reports
Manage a Report’s Schedule

Manage a Report’s Schedule

Create, change, view or delete a scheduled report from the Schedule Report page.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To schedule reports:	“Schedule Reports”
To delete a scheduled report run:	“Modify All Data”

Tips for Scheduling Reports (2:19 minutes)

On the Schedule Report page you can:

- Schedule a new or existing report to run in the future and have its results emailed to others.
- Change the schedule on a previously scheduled report.
- View scheduled jobs for all reports in your organization or view the schedule for just a selected report.

- Delete a scheduled run for a selected report.

Additional scheduled reports may be available for purchase.

See Also:

Schedule Reports
Schedule a Report for Refresh

Change a Report's Schedule

You can make changes to an already scheduled report on the Schedule Report page.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To schedule reports:	"Schedule Reports"

Tips for Scheduling Reports (2:19 minutes)

1. On the Reports tab, click the name of the scheduled report.
2. Click **Schedule Future Runs...** from the **Run Report** drop-down.
3. Make the required changes on the Schedule Report page.
4. Click **Save Report Schedule**.

See Also:

Schedule Reports
Manage a Report's Schedule

Delete a Report's Schedule

Select a scheduled report and unschedule it to delete its scheduled run.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To schedule reports:	"Schedule Reports"
To delete a scheduled report run:	"Modify All Data"

Tips for Scheduling Reports (2:19 minutes)

1. On the Reports tab, click the name of the scheduled report.
2. Click **Schedule Future Runs...** from the **Run Report** drop-down.
3. Click **Unschedule Report**.

   The run schedule for the report is canceled and *not* sent to the Recycle Bin.

See Also:

Schedule Reports
Manage a Report's Schedule

Tips on Scheduling Reports

Some tips to keep in mind about timings, limits, and email notifications when scheduling a report.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Scheduling Report Runs

- On the Reports tab, hover over ✔ in the schedule column (🗓) to view a report's schedule. Note that users without the "Schedule Reports" permission can't see this icon and information.
- You can't create schedules for joined reports.
- Your organization is limited to no more than 200 scheduled reports. Daily limits differ by edition. Additional scheduled reports may be available for purchase.
- Scheduled reports run in the time zone of the user who set up the schedule. For example, if the `Time Zone` field on your user record is set to Pacific Standard Time, and you schedule a report to run every day at 2:00 PM, then the report runs every day between 2:00 PM and 2:29 PM Pacific Standard Time.
- If you view and save a schedule in a time zone different from the one in which it was previously scheduled, the time slot could potentially change.
- If you schedule a report to run on a specific day of every month, the report runs only on months that have that specific day. For example, if you schedule a report to run on the 31st day of every month, then the report runs only on months that have 31 days. To schedule a report on the last day of every month, choose last from the `On day of every month` drop-down list.
- The report runs within 30 minutes of the time you select for `Preferred Start Time`. For example, if you select 2:00 PM as your preferred start time, the report runs any time between 2:00 PM and 2:29 PM, depending on how many other reports are scheduled at that time.
- Scheduling reports is not tracked in the audit trail history.

Emailing Scheduled Reports

- Report charts are not included in emailed reports. To email a chart of the report, create a dashboard and schedule a dashboard refresh.
- Outlook 2007 limitation: Report emails containing tables more than 22 inches wide or with more than 63 columns might not display properly.
- The maximum size for emailed reports is 10 MB. Try the following techniques to reduce the amount of data in your report:
  - ◊ Filter for your own records, rather than all records.
  - ◊ Limit the scope of the data to a specific date range.

- ◊ Exclude unnecessary columns from your report.
- ◊ Hide the report details.

See Also:

Schedule Reports
Schedule a Dashboard Refresh
Manage a Report's Schedule

Share Reports and Dashboards

Reports and dashboards are shared through folders. You share the folder, not the report or dashboard itself. To let others work with your report or dashboard, give them Viewer, Editor or Manager access to the folder where the report or dashboard is stored.

Available in: **All** editions except **Database.com**

See Also:

Communicate Your Report Data Effectively
Share a Report or Dashboard Folder
Access Levels for Report and Dashboard Folders
Comparing Access Levels for Report and Dashboard Folders
User Permissions for Sharing Reports and Dashboards

Share a Report or Dashboard Folder

To enable others to use a report or a dashboard, share the folder it is in. Give each user, public group, or role the degree of access to the folder that makes sense for them.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To share a report folder:	"Manager" folder access or "Manage Reports in Public Folders"
To share a dashboard folder:	"Manager" folder access or "Manage Dashboards in Public Folders"

Note: To give someone access to a folder, you must have either **Manager** access to that folder or the `Manage Reports in Public Folders` user permission (for report folders) or the `Manage Dashboards in Public Folders` user permission (for dashboard folders).

When you create a folder, you're its manager. Only you, and others with administrative permissions, can see it.

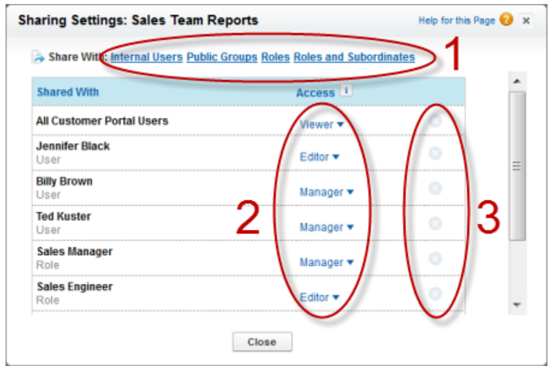


Figure 2: (1) Share your folder by user, by user group, or by role. (2) Choose the access level you want each user, group or role to have. (3) Stop sharing the folder with the user, group or role.

See Also:

Share Reports and Dashboards
Share a Report or Dashboard with an Individual User
Share a Report or Dashboard with a Group
Share a Report or Dashboard by Role
Access Levels for Report and Dashboard Folders
User Permissions for Sharing Reports and Dashboards
Access Levels for Report and Dashboard Folders
User Permissions for Sharing Reports and Dashboards

Share a Report or Dashboard with an Individual User

If you only have one or two people to share a report or dashboard folder with, give them access individually.

Available in: **All** editions except **Database.com**

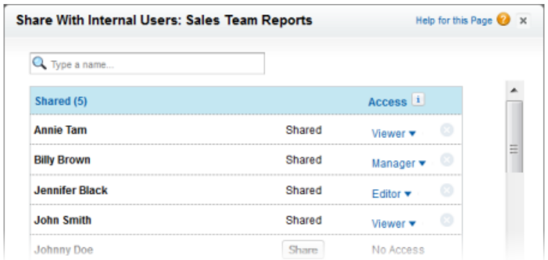
User Permissions Needed	
To share a report folder with internal users:	"Manager" folder access or "Manage Reports in Public Folders"
To share a dashboard folder with internal users:	"Manager" folder access or "Manage Dashboards in Public Folders"

1. On the Reports tab, click Sharing Settings on a folder.
2. Select `Internal Users`.

   Note: Internal users don't include customer portal or partner portal users.

3. Find the user you want, click **Share**, and choose an access level.

To search, just start entering a name.



4. Click **Done**, review your changes, and click **Close**.

See Also:

Share a Report or Dashboard Folder

Share a Report or Dashboard with a Group

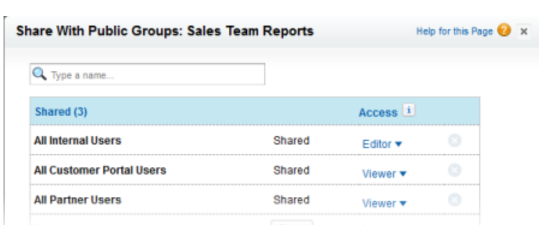
If more than one or two people need access to an analytics folder, share the folder with a public group. That way you don't have to keep track of which individuals you've shared it with.

Available in: **All** editions except **Database.com**

User Permissions Needed	
To share a report folder with public groups:	"Manager" folder access or "Manage Reports in Public Folders"
To share a dashboard folder with public groups:	"Manager" folder access or "Manage Dashboards in Public Folders"

1. On the Reports tab, click Sharing Settings on a folder.
2. Select `Public Groups`.
3. Find the group you want, and click **Share**.

   To search, start typing a name.



4. Choose the sharing level you want to give this group.

Note: Portal users can only have Viewer access to reports, and they can't use dashboards.

5. Click **Done**, review your changes, and click **Close**.

See Also:

Share a Report or Dashboard Folder

Share a Report or Dashboard by Role

When you give people access to a report or dashboard folder by virtue of the role they hold, you can closely control who has access without having to keep track of users or groups.

Available in: **All** editions except **Database.com**

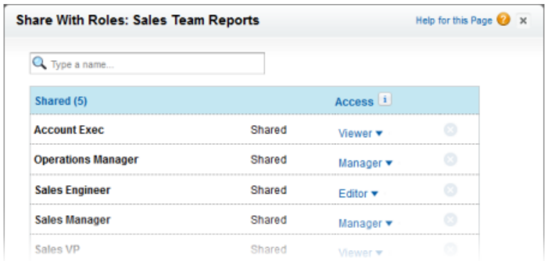
User Permissions Needed	
To share a report folder with a role or role and subordinates:	“Manager” folder access or “Manage Reports in Public Folders”
To share a dashboard folder with a role or role and subordinates:	“Manager” folder access or “Manage Dashboards in Public Folders”

You can give report or dashboard folder access to users in a role, or to those users plus users in roles subordinate to that role.

For example, suppose the `VP of Sales` role and its subordinates have Viewer access to a dashboard folder, while the role itself (VP of Sales) has Manager access to the folder. This means a user in the VP of Sales role has greater control than someone with a role that's lower in the role hierarchy. If the VP of Sales leaves the company, whoever next assumes that role will be able to manage dashboards in the folder.

1. On the Reports tab, click Sharing Settings on a folder.
2. Select **Roles** or **Roles and Subordinates**.
   - Select **Roles** if you want to give access to all users who have that role.
   - Select **Roles and Subordinates** if you want to give access to those users plus everyone with a role below them in the role hierarchy.
3. Find the role you want, click **Share**, and choose a level of access.

   To search, enter a name.



4. Click **Done**, review your changes, and click **Close**.

See Also:

Share a Report or Dashboard Folder

Access Levels for Report and Dashboard Folders

Each user, group, or role can have its own level of access to a report and dashboard folder. Viewers can see the data; Editors can determine what data is shown; and Managers can control access.

Available in: **All** editions except **Database.com**

Tip: If you're not ready to share a report or dashboard, keep it in a personal folder that only you can access. The “My Personal Custom Reports” folder and the “My Personal Dashboards” folder are already set up for you. Create more if you need them. When you create a folder, it is accessible only to you and users with administrative permissions until you share it.

See Also:

Share Reports and Dashboards
Viewer Access Levels to Report and Dashboard Folders
Editor Access to Report and Dashboard Folders
Manager Access to Report and Dashboard Folders
Share a Report or Dashboard Folder
Share a Report or Dashboard Folder
Comparing Access Levels for Report and Dashboard Folders

Viewer Access Levels to Report and Dashboard Folders

With Viewer access you can see the data in a report or dashboard, but you can’t make any changes, except by cloning it into a new report or dashboard. All users have at least Viewer access to report and dashboard folders that have been shared with them. (Some users may have administrative user permissions that give them greater access.)

Available in: **All** editions except **Database.com**

For example, Samir is a sales rep who likes to start his day by checking his position on the sales leader board, which appears on the Master Sales dashboard. He has to refresh the dashboard to get the latest standings, so he needs to be able to view the data in the underlying reports. But he doesn't want to edit the reports or the dashboard. All he needs is Viewer access to the folder that contains the Master Sales dashboard.

See Also:

Access Levels for Report and Dashboard Folders
Editor Access to Report and Dashboard Folders
Manager Access to Report and Dashboard Folders

Editor Access to Report and Dashboard Folders

When you are an Editor on a folder, you can view and modify the reports and dashboards it contains, and move them to and from any other folders you have Editor or Manager access to.

Available in: **All** editions except **Database.com**

For example, Allison, a sales manager, wants to provide a different sales dashboard for each of three regional teams. She'll need Editor access to the folder that contains the Master Sales dashboard so she canmove the underlying reports into the right folders and then modify them to show the appropriate data. She'll also need the Create and Customize Dashboards user permission.

Note: You can't give Editor access to standard report folders. All users get Viewer access to these folders by default.

See Also:

Access Levels for Report and Dashboard Folders
Viewer Access Levels to Report and Dashboard Folders
Manager Access to Report and Dashboard Folders

Manager Access to Report and Dashboard Folders

With Manager access, you can do everything Viewers and Editors can do, plus control other users' access to it, change its properties, or delete it.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

For example, Alan is a sales administrator who manages too many reports to pay attention to them all individually. He creates a report folder called Regional Reports. As its creator, he automatically has Manage rights to the folder. He gives Sales Reps, a public group, Viewer access. And he makes Allison, the sales manager, another Manager on the folder.

Note: You can't give Manager access to standard report folders. All users get Viewer access to these folders by default.

See Also:

Access Levels for Report and Dashboard Folders
Viewer Access Levels to Report and Dashboard Folders
Editor Access to Report and Dashboard Folders

Comparing Access Levels for Report and Dashboard Folders

Use this chart for a quick view of what Viewer, Editor, and Manager access enables users to do with report and dashboard folders.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

	Viewer	Editor	Manager
View reports or dashboards in the folder	✓	✓	✓
Run reports in the folder	✓	✓	✓
Refresh dashboards in the folder	✓	✓	✓
Change/move/delete your own reports or dashboards in the folder	✓	✓	✓
See who has what level of access to the folder	✓	✓	✓
Change/move/delete reports or dashboards created by someone else in the folder		✓	✓
Change the folder's name			✓
Change the folder's sharing settings			✓

See Also:

Share Reports and Dashboards
Access Levels for Report and Dashboard Folders
User Permissions for Sharing Reports and Dashboards

User Permissions for Sharing Reports and Dashboards

Each level of access to a report or dashboard folder consists of a combination of specific user permissions. As an administrator, you can further fine-tune users' access to dashboards and reports by assigning or removing one or more permissions.

Available in: **All** editions except **Database.com**

When analytics folder sharing is enabled, all users get Viewer access to report and dashboard folders except users with higher administrative permissions. To give users broader privileges, assign Editor or Manager folder access and give report and dashboard user permissions as needed.

User Permission	Description
`Create and Customize Dashboards`	Create, edit, and delete dashboards in **My Personal Dashboards** folder. Create dashboards and save into any shared folder if sharing rights allow.
`Create and Customize Reports`	Create, edit, and delete reports in **My Personal Custom Reports** folder. Create reports and save into any shared folder if sharing rights allow.
`Create Dashboard Folders`	Create dashboard folders and manage them if sharing rights allow.
`Create Report Folders`	Create report folders and manage them if sharing rights allow.
`Edit My Dashboards`	Edit, move, save, and delete dashboards you created in shared folders.
`Edit My Reports`	Edit, move, save, and delete reports you created in shared folders.
`Manage Dashboards in Public Folders`	Create, edit, delete dashboards[1], and manage their sharing in all public dashboard folders, which does not include others' personal folders. This permission allows users to edit and share dashboards in all folders, including hidden folders. They also get these permissions: • `Create and Customize Dashboards` • `Create Dashboard Folders` • `Edit My Dashboards` • `View Dashboards in Public Folders` ([1] To edit a dynamic dashboard, users also need `Manage Dynamic Dashboards` and `View My Team's Dashboards`.)
`Manage Reports in Public Folders`	Create, edit, delete reports, and manage their sharing in all public report folders, which does not include others' personal folders. This permission allows users to edit and share reports in all folders, including hidden folders. They also get these permissions: • `Create and Customize Reports` • `Create Report Folders` • `Edit My Reports` • `View Reports in Public Folders`
`View Dashboards in Public Folders`	View dashboards in public dashboard folders, which does not include others' personal folders.

`View Reports in Public Folders`	View reports in public report folders, which does not include others' personal folders.

See Also:

Share Reports and Dashboards
Share a Report or Dashboard Folder
Share a Report or Dashboard Folder
Comparing Access Levels for Report and Dashboard Folders

Report on Salesforce Data with Excel

Connect for Office includes an Excel add-in that enables you to securely access your Salesforce reports with Microsoft® Excel®. You create the reports you need in Salesforce, then pull them into an Excel worksheet, and use Excel's formulas, charts, and pivot tables to customize and analyze your data.

Available in: **Personal**, **Contact Manager**, **Group**, **Professional**, **Enterprise**, and **Unlimited** Editions

User Permissions Needed	
To access Salesforce reports from Excel:	"Run Reports" AND "Export Reports"

The Excel add-in provides the same access to reports and fields that you normally experience in Salesforce. You can distribute your customized Excel worksheets via the Documents tab, allowing all users to track customized analytics in real time. You can reference data from multiple reports in one worksheet to create a single-page overview of key metrics.

Communication between Excel and Salesforce uses the same secure HTTPS protocol as when you log in via your Web browser.

See Also:

Communicate Your Report Data Effectively
Install Connect for Office
Log Into Connect for Office
Import Reports Into Excel with Connect for Office
Refresh and Update Data with Connect for Office

Install Connect for Office

Available in: **Personal**, **Contact Manager**, **Group**, **Professional**, **Enterprise**, and **Unlimited** Editions

The system requirements for Connect for Office are:

- Microsoft® Office 2000, 2002, 2003, or 2007
- Microsoft® Windows® 2000, Windows XP, or Windows Vista® (32-bit only)

1. Close all Microsoft® Office programs, including Word, Excel®, and Outlook®.
2. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
3. From the left pane, select one of the following:
   - If you clicked **Setup**, select **Desktop Integration** > **Connect for Office**
   - If you clicked **My Settings**, select **Desktop Add-Ons** > **Connect for Office**.

   Tip:

   If you can't see the download page, ask your administrator for access.

4. Click **Install Now**.
5. Click **Yes** when prompted to install Connect for Office. We recommend that you install Connect for Office to the default folder suggested by the installer.
6. After the installation completes, open Excel or Word, and select the **salesforce.com** menu to begin using Connect for Office.
7. The first time you open Word, you are prompted to enable macros from salesforce.com. You must enable the macros and accept salesforce.com as a macro publisher to use the Word add-in.

Note: The Connect for Office installer edits the registry on your computer. If your organization imposes security that prevents you from editing the registry, log in as the administrator of your machine before installing Connect for Office or contact your IT department for assistance.

See Also:

Report on Salesforce Data with Excel
Log Into Connect for Office

Log Into Connect for Office

You need to log in to Salesforce before you can request data from your Salesforce reports.

Available in: **Personal**, **Contact Manager**, **Group**, **Professional**, **Enterprise**, and **Unlimited** Editions

1. Open Excel.

2. In Microsoft Office 2003 and earlier, select **Log In** from the **salesforce.com** drop-down menu on the Excel toolbar. In Microsoft Office 2007, select the salesforce.com tab on the Ribbon, click the **Reporting** drop-down menu, and then select **Log In**.
3. Enter your Salesforce username and password.
4. Click **Login**.

Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, you must enter `mypasswordXXXXXXXXXX` to log in.

See Also:

Report on Salesforce Data with Excel
Install Connect for Office
Import Reports Into Excel with Connect for Office

Import Reports Into Excel with Connect for Office

Import your custom or standard Salesforce reports into Excel so you can further analyze the data using Excel's formulas, charts, and pivot tables.

Available in: **Personal**, **Contact Manager**, **Group**, **Professional**, **Enterprise**, and **Unlimited** Editions

User Permissions Needed	
To access reports in Excel:	"Run Reports" AND "Export Reports"

Tip: Here's a sample Excel file you can download that shows a raw and a formatted report plus charts and summary tables built using Excel's pivot tables and pivot charts.

1. Create a custom report in Salesforce. You can also use any of the standard reports.
2. Open a blank worksheet in Excel.
3. Select the salesforce.com tab on the Ribbon, click the **Reporting** drop-down menu, and then select **Import a Report...**.

   Note: In Microsoft Office 2003 and earlier, select **Import a Report...** from the **salesforce.com** drop-down menu on the Excel toolbar.

4. Select a report from the list of standard and custom Salesforce reports available to you.
5. Specify where you want to put the report data in your Excel file.

   a. Enter the name of your Excel worksheet in the `Destination worksheet` field.
   b. In the `Cell` field, enter the uppermost cell where you want to begin putting the data.

If the specified worksheet and cells already contain report data, Connect for Office moves the existing data over to make room for the new report data.

Tip: Avoid renaming worksheets that contain imported reports. When you do that the connection between the worksheet and your report is lost. You must import the report again to refresh the data.

6. Choose **Raw Data** to import the data without formatting, subtotals, or grand totals. Choose **Formatted** to keep the colors, fonts, subtotals, and grand totals from the Salesforce report.

   This is useful for importing large matrix reports with the data already summarized into a small table.

   Tip:

   - The **Raw Data** option is best if you're importing summary or matrix reports for use with Excel formulas and pivot tables.
   - Use the **Formatted** option if you're importing large matrix reports with the data already summarized into a small table.

7. Click **OK**.

Tip: You can copy and paste data from Excel into other Office applications. Use the **Paste Special** option, rather than **Paste**, to reference the Excel data as a worksheet object. If the data then changes in Excel, you can right-click the object and update it automatically. See the Microsoft Word help for more information.

See Also:

Report on Salesforce Data with Excel
Log Into Connect for Office
Refresh and Update Data with Connect for Office

Refresh and Update Data with Connect for Office

Keep your Salesforce reports up to date in Excel by periodically refreshing the report data and any pivot tables you have created.

After logging into Salesforce, select any of the following options from the **salesforce.com** Ribbon tab (or toolbar in Office 2003 and earlier):

- **Refresh Existing Reports...** - Allows you to choose which reports you want to update in Excel.
  1. From the list of reports you have imported, select the reports to update.
  2. Optionally, select **Update Pivot Tables** to update any pivot tables you have created in Excel for the selected reports. The **Refresh All Reports** menu choice does this automatically.
  3. Click **Refresh Selected** to update the report data.

  To remove reports from this list, select the report names and click **Delete Selected**. The reports are not removed from your Excel worksheet or from Salesforce, only from the list of reports available for refreshing.

- **Refresh All Reports** - Refreshes all of the reports that you have imported into your Excel file, including the pivot tables referenced by those reports.

Tip:

- If you write a formula, select an entire column rather than a range of cells, because the number of rows in your report may change when you refresh the report data. For example, use `=Sum(Sheet2!E:E)` to sum column E rather than `=Sum(Sheet2!E1:E200)`.
- If you use the `VLOOKUP` and `HLOOKUP` functions in Excel to join data across different cell ranges, these functions may make report record IDs, which are 15-character alphanumeric IDs, case-sensitive. Make sure to use the correct case when identifying report records. See the Microsoft Excel help for more information.

See Also:

Report on Salesforce Data with Excel
Import Reports Into Excel with Connect for Office

Report on Historical Data with Analytic Snapshots

An analytic snapshot lets you report on historical data. Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object. They can then schedule when to run the report to load the custom object's fields with the report's data. Analytic snapshots enable you to work with report data similarly to how you work with other records in Salesforce.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

After you set up an analytic snapshot, users can:

- Create and run custom reports from the target object.
- Create dashboards from the source report.
- Define list views on the target object, if it's included on a custom object tab.

For example, a customer support manager could set up an analytic snapshot that reports on the open cases assigned to his or her team everyday at 5:00 PM, and store that data in a custom object to build a history on open cases from which he or she could spot trends via reports. Then the customer support manager could report on point-in-time or trend data stored in the custom object and use the report as a source for a dashboard component. For the total number of analytic snapshots you can create, see *Salesforce Limits*.

See Also:

Communicate Your Report Data Effectively
Prepare Analytic Snapshots
Define an Analytic Snapshot
Map Analytic Snapshot Fields
Schedule and Run an Analytic Snapshot
Manage Analytic Snapshots
Troubleshoot Analytic Snapshots
Create a Dashboard
How Salesforce Analytics Works
Create a Custom Report in Accessibility Mode

Prepare Analytic Snapshots

To set up an analytic snapshot, you need a source report and a target object with fields to contain the data in the source report.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, save, and schedule an analytic snapshot:	“Manage Analytic Snapshots”
To run an analytic snapshot as a running user and add the results to a custom object, the running user must have:	“Run Reports” AND “Create” on the target object

To set up an analytic snapshot:

1. Create a new custom report that includes the fields you want to load as records into a target object.
2. Create a new custom object in which to store the records loaded from the source report.
3. Create fields on the target object that will receive the source report's results when the analytic snapshot runs.

Tips on Source Reports for Analytic Snapshots

- If you save a tabular source report with its details hidden, the report will not be available to include in an analytic snapshot. Furthermore, if you hide the details of a tabular source report included in an analytic snapshot, the analytic snapshot will fail when it runs. To verify that the details of the tabular source report are not hidden, view the report, click **Show Details**, and save the report. The **Show Details** button only displays if the report's details are hidden.
- When creating the source report for your analytic snapshot, note the names of the fields you added to the report, as those field names may be useful to you when you create fields on the target object in which to store the report results.
- You can choose any custom tabular or summary report as the source report, except legacy forecast reports, Quota vs Actual reports, and Leads by Source reports. The `Source Report` drop-down list does not display standard reports..

- You can include up to 100 fields in your source report.
- You can delete the schedule of when an analytic snapshot runs. You can't stop or pause an analytic snapshot when it is running, nor can you delete its source report. To delete the source report, you must first remove the report from the analytic snapshot by changing the report in the `Source Report` drop-down list..
- If you select Load No Data in the Fields from Source Report column, no data will load into the corresponding field in the Fields in Target Object column when the analytic snapshot runs. .
- The `(No fields with compatible data type)` field displays in the Fields from Source Report column when a field on the target object does not match the data type of a field on the source report..

Tips on Target Objects for Analytic Snapshots

Consider the following when setting up target objects for analytic snapshots:

- In Enterprise, Unlimited, and Developer Editions, use field-level security to make the target object's fields visible to the appropriate users.
- You can't delete a custom object if it's a target object in an analytic snapshot.
- The fields on the target object determine field mapping availability. For example, your source report may include ten fields, but if your target object includes one field, then you can only map one field in your analytic snapshot.
- You can add up to 100 fields to the target object.
- Target objects cannot contain validation rules or be included in a workflow.
- Analytic snapshots cannot contain target objects that trigger Apexcode to run when new records are created..
- When an analytic snapshot runs, it can add up to 2,000 new records to the target object. If the source report generates more than 2,000 records, an error message is displayed for the additional records in the Row Failures related list. You can access the Row Failures related list via the Run History section of an analytic snapshot detail page.

Tips on Analytic Snapshots

- Be aware of the type of license your `Running User` has. For example, if the `Running User` of an analytic snapshot has a Salesforce license, users who have Force.com Platform or Salesforce Platform One licenses will not be able to view it. Alternatively, if the `Running User` has a Force.com Platform or Salesforce Platform One license, users who have Salesforce licenses will be able to see the analytic snapshot. If you have users with Force.com Platform or Salesforce Platform One licenses, we recommend creating a separate analytic snapshot for them with a `Running User` that has a Force.com Platform or Salesforce Platform One user license.
- You can only map fields with compatible data types. For example, you can map a currency field to a number field.
- If you change the source report or target object on an analytic snapshot with existing field mappings, the field mappings are deleted when you save the analytic snapshot. You can also view `Summary Fields in Source Report` and `Fields in Target Object` to see the number of summary or target fields, respectively..
- You must map at least one field from the source report to one field on the target object or data will not load from the source report to the target object when the analytic snapshot runs.
- When an analytic snapshot is defined, deleted, or its source report or target object is changed, it is tracked in your organization's setup audit trail history.
- The Run History section on an analytic snapshot detail page displays details on when the analytic snapshot ran. Details include:
  - ◊ The date and time at which the analytic snapshot ran
  - ◊ The name of the source report, target object, and running user
  - ◊ The time it took for the analytic snapshot to run
  - ◊ The total number of detail or summary rows in the source report, depending on the report type
  - ◊ The number of records created in the target object

◊ Whether or not the analytic snapshot ran successfully

See Also:

Report on Historical Data with Analytic Snapshots
Define an Analytic Snapshot
Report on Historical Data with Analytic Snapshots
Create a Custom Report in Accessibility Mode

Define an Analytic Snapshot

After you create a source report, target object, and target object fields, you can define your analytic snapshot. You define an analytic snapshot by naming it and choosing the source report that will load report results into the target object you specify when the analytic snapshot runs.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, save, and schedule an analytic snapshot:	"Manage Analytic Snapshots"
To run an analytic snapshot as a running user and add the results to a custom object, the running user must have:	"Run Reports" AND "Create" on the target object

1. From Setup, click **Data Management** > **Analytic Snapshots**.
2. Click **New Analytic Snapshot**.
3. Enter a name, unique name, and description for your analytic snapshot.
4. Choose a user in the `Running User` field by clicking the lookup icon.

   The user in the `Running User` field determines the source report's level of access to data. This bypasses all security settings, giving all users who can view the results of the source report in the target object access to data they might not be able to see otherwise.

   Only users with the "Modify All Data" permission can choose running users other than themselves.
5. Select a report from the `Source Report` drop-down list.

   The report you choose determines the report results that will load as records into the target object when the analytic snapshot runs.

   You can choose any custom tabular or summary report as the source report, except legacy forecast reports, Quota vs Actual reports, and Leads by Source reports. The `Source Report` drop-down list does not display standard reports.
6. Select a custom object from the `Target Object` drop-down list.

   The custom object you choose will receive the source report's results as records when the analytic snapshot runs.

   If a record used for an analytic snapshot has no record type associated with it, the record type of the running user is associated with the analytic snapshot by default.

7. Click **Save** to save the definition of your analytic snapshot, or click **Save & Edit Field Mappings** to save your analytic snapshot and map its fields.
8. Map the fields on the source report to the fields on the target object.

See Also:

Report on Historical Data with Analytic Snapshots
Prepare Analytic Snapshots
Map Analytic Snapshot Fields
Build a Report From a Template

Map Analytic Snapshot Fields

After you create a source report, target object, target object fields, and define your analytic snapshot, you can map the fields on your source report to the fields on your target object. You map source report fields to target object fields so that when the report runs, it automatically loads specific target object fields with data from specific source report fields.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, save, and schedule an analytic snapshot:	"Manage Analytic Snapshots"
To run an analytic snapshot as a running user and add the results to a custom object, the running user must have:	"Run Reports" AND "Create" on the target object

1. From Setup, click **Data Management** > **Analytic Snapshots**.
2. Select the name of the analytic snapshot whose fields you want to map.
3. Click **Edit** on the Field Mappings section.
4. For summary reports, select the `Grouping Level` at which summary data is extracted from the source report. Data loaded into the target object is taken from summary fields at the grouping level you specify. The `Grand Summary` summarizes on the total for all grouping levels.
5. In the Fields from Source Report column, click a `Load No Data` drop-down list and select a field from the source report to map to a custom object field in the Fields in Target Object column. Only summary fields can be mapped for analytic snapshots based on summary reports. Note that the fields for summary reports may vary depending on the grouping level selected.
6. Click **Quick Save** to save field mappings and continue mapping fields, or click **Save** to save field mappings and return to the analytic snapshot's detail page.
7. Next, schedule the analytic snapshot to run.

Considerations for Mapping Analytic Snapshot Fields

- You must map at least one field from the source report to one field on the target object or data will not load from the source report to the target object when the analytic snapshot runs.

- You can only map fields with compatible data types. For example, you can map a currency field to a number field.
- A custom summary formula can be mapped only if the grouping level in the analytic snapshot and the grouping level in the custom summary formula match.
- If you select Load No Data in the Fields from Source Report column, no data will load into the corresponding field in the Fields in Target Object column when the analytic snapshot runs..
- The `(No fields with compatible data type)` field displays in the Fields from Source Report column when a field on the target object does not match the data type of a field on the source report.
- The fields on the target object determine field mapping availability. For example, your source report may include ten fields, but if your target object includes one field, then you can only map one field in your analytic snapshot.
- You cannot map fields from the source report to the following fields on the target object: `Created By`, `Last Modified By`, `Created Date`, and `Last Modified Date`.
- When you map fields from the source report to the target object, some data may lose its context when loaded to the target object. For example, if you map a date and time field from the source report to a text field on the target object, the date and time load to the target object without the time zone.
- When executing an analytic snapshot, if the running user does not have "read" or "write" access to a mapped field in the target object, that field is dropped from the mapping, but does not cause the execution to fail. If a required field in the target object is not mapped, the execution fails. To ensure that fields are always mapped, make them required or set default values for them.
- To map a field in the source report to a lookup field on the target object, you must map to the ID of the object associated with the lookup. For example, to map to an opportunity lookup field, you must map to the `Opportunity ID`. To get the `Opportunity ID` in the source report, you may need to use a custom report type to include ID and other related fields.

See Also:

Report on Historical Data with Analytic Snapshots
Define an Analytic Snapshot
Schedule and Run an Analytic Snapshot
Report on Historical Data with Analytic Snapshots
Build a Custom Summary Formula

Schedule and Run an Analytic Snapshot

After you create a source report, target object, target object fields, define your analytic snapshot, and map its fields, you can schedule when it runs. You can schedule an analytic snapshot to run daily, weekly, or monthly so that data from the source report is loaded into the target object when you need it.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, save, and schedule an analytic snapshot:	"Manage Analytic Snapshots"
To run an analytic snapshot as a running user and add the results to a custom object, the running user must have:	"Run Reports" AND "Create" on the target object

The number of analytic snapshots you can schedule to run is determined by your Edition. After an analytic snapshot has run, you can send an email notification to yourself and other users that includes details about the analytic snapshot run, such as the date and time it ran, whether it ran successfully, and how many records were loaded into the target object from the source report. Also, the notification includes a link to the analytic snapshot detail page in Salesforce.

1. From Setup, click **Data Management** > **Analytic Snapshots**.
2. Select the name of the analytic snapshot that you want to schedule to run.

   Analytic snapshots will not run as scheduled if the user in the `Running User` field does not have access to the folder in which the source report is stored.

   Note: If the running user becomes inactive, the report is not run. The system administrator receives an email notification to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.

3. Click **Edit** on the Schedule Analytic Snapshot section.

   The Schedule Analytic Snapshot section on an analytic snapshot detail page displays details on when the analytic snapshot is scheduled to run.
4. Select a notification setting to send an email when the analytic snapshot finishes running:
   - Click `Me` to send an email to the email address specified on your Salesforce user record.
   - Click `Others...` to send an email to additional users. You can only send analytic snapshot notifications to email addresses included on Salesforce user records. Furthermore, you can only select Users and Public Groups in the `Search` drop-down list.
5. Schedule the analytic snapshot to run:
   - In the `Frequency` field, select the frequency at which the analytic snapshot runs. When you click the `Daily`, `Weekly`, or `Monthly` fields, more options display that allow you to refine frequency criteria.

     If you schedule an analytic snapshot to run on a specific day of every month, the analytic snapshot will only run on months that have that specific day. For example, if you schedule an analytic snapshot to run on the 31st day of every month, then the analytic snapshot will only run on months that have 31 days. If you want an analytic snapshot to run on the last day of every month, choose last from the `On day of every month` drop-down list.
   - In the `Start` and `End` fields, specify the dates during which you wish to schedule the analytic snapshot to run.
   - In the `Preferred Start Time` drop-down list, click the **Find available options...** link to choose a preferred start time for the analytic snapshot to run.
     - ◊ Your preferred start time may not be available if other users have already selected that time to run an analytic snapshot or your organization has reached its analytic snapshot limit.
     - ◊ Analytic snapshots run in the time zone of the user who schedules the run. For example, if the `Time Zone` field on your user record is set to Pacific Standard Time, and you schedule an analytic snapshot to run every day at 2:00 PM, then the analytic snapshot will run every day at 2:00 PM Pacific Standard Time.
     - ◊ If you view and save a schedule in a time zone different from the one in which it was previously scheduled, the time slot could potentially change.
     - ◊ The analytic snapshot runs within an hour of the time you select in the `Preferred Start Time` drop-down list. For example, if you select 2:00 PM as your preferred start time, the analytic snapshot may run any time in between 2:00 PM or 2:59 PM, depending on how many other analytic snapshots are scheduled to refresh at that time.
6. Click **Save** to schedule the analytic snapshot to run.

When the analytic snapshot runs, it adds new records to the target object.

Optionally, once you have scheduled an analytic snapshot to run, you can perform the following actions after you click **Edit** on the Schedule Analytic Snapshot section of an analytic snapshot detail page:

- Click **Edit** to update the notification and frequency settings of the analytic snapshot.
- Click **Delete** to permanently delete the existing schedule of when the analytic snapshot runs.

An analytic snapshot will fail during a scheduled run if:

- The source report includes more than 100 fields
- The source report was changed from summary to tabular
- The selected grouping level for a summary source report is no longer valid
- The running user does not have access to the source report
- The running user does not have the “Run Reports” permission
- The target object has more than 100 custom fields
- The target object contains validation rules
- The target object is included in a workflow
- The target object is a detail object in a master-detail relationship
- The target object runs an Apex trigger when new records are created on it
- The running user does not have the “Create” permission on the target object. Note that if the target object's status is `In Development`, the running user must have the “Customize Applications” permission.

See Also:

Report on Historical Data with Analytic Snapshots
Map Analytic Snapshot Fields
Manage Analytic Snapshots

Manage Analytic Snapshots

After you set up an analytic snapshot, you can view details about it and edit and delete it. From Setup, click **Data Management** > **Analytic Snapshots** to display the Analytic Snapshots page, which shows the list of analytic snapshots defined for your organization.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, save, and schedule an analytic snapshot:	“Manage Analytic Snapshots”
To run an analytic snapshot as a running user and add the results to a custom object, the running user must have:	“Run Reports” AND “Create” on the target object

From the Analytic Snapshots page, you can:

- Select a list view from the `View` drop-down list to go directly to that list page, or click **Create New View** to define your own custom view..
- Define a new analytic snapshot by clicking **New Analytic Snapshot**.
- Update the analytic snapshot name, description, running user, source report, and target object by clicking **Edit** next to its name. Only users with the “Modify All Data” permission can choose running users other than themselves. If you have the “Customize Application” permission, enter a unique name to be used by the API and managed packages.

  If you change the source report or target object on an analytic snapshot with existing field mappings, the field mappings are deleted when you save the analytic snapshot. You can also view `Summary Fields in Source Report` and `Fields in Target Object` to see the number of summary or target fields, respectively.
- Delete an analytic snapshot by clicking **Del** next to its name. After the analytic snapshot is deleted, it cannot be restored from the Recycle Bin.

  Important: When you delete an analytic snapshot, the source report and target object aren’t deleted; however, when the source report runs, it won’t load the target object with data.

  You can delete the schedule of when an analytic snapshot runs. You can’t stop or pause an analytic snapshot when it is running, nor can you delete its source report. To delete the source report, you must first remove the report from the analytic snapshot by changing the report in the `Source Report` drop-down list.

- Display detailed information about an analytic snapshot and customize it further by clicking its name. Then you can:
  - ◊ Click links in the Identification section that redirect you to the analytic snapshot running user, source report, and target object. In addition, you can view the preferred date and time at which the analytic snapshot will approximately run next in the `Next Run` field, and view the date and time at which it last ran in the `Last Run` field.
  - ◊ Click **Edit** in the Field Mappings section to further customize the fields mapped from the source report to the target object.

    The Analytic Snapshot Field Mappings section displays which source report fields are mapped to the target object's fields. You can view the number of fields in the source report available for mapping to the target object in the `Columns in Source Report` field. Also, you can view the number of fields available for mapping in the target object in the `Fields in Target Object` field.
  - ◊ Click **Edit** in the Schedule Analytic Snapshot section to schedule when to run the analytic snapshot.

    The Schedule Analytic Snapshot section displays details about when the analytic snapshot is currently scheduled to run.
  - ◊ The Run History section displays details about when the analytic snapshot ran. Details include:
    - The date and time at which the analytic snapshot ran
    - The name of the source report, target object, and running user
    - The time it took for the analytic snapshot to run
    - The total number of detail or summary rows in the source report, depending on the report type
    - The number of records created in the target object
    - Whether or not the analytic snapshot ran successfully

Up to 200 records are stored in the Run History section. After 200 records are stored, the oldest record is automatically deleted and cannot be retrieved from the Recycle Bin.

See Also:

Report on Historical Data with Analytic Snapshots
Schedule and Run an Analytic Snapshot
Troubleshoot Analytic Snapshots
Report on Historical Data with Analytic Snapshots

Troubleshoot Analytic Snapshots

The Run History section of an analytic snapshot detail page displays if an analytic snapshot ran successfully or not. When an analytic snapshot fails during a scheduled run, the failure is noted in the `Result` column. To view the details of a run, click the date and time of the run in the `Run Start Time` column.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, save, and schedule an analytic snapshot:	"Manage Analytic Snapshots"
To run an analytic snapshot as a running user and add the results to a custom object, the running user must have:	"Run Reports" AND "Create" on the target object

Tip:

- If the `Total Row Number` is blank, the run failed before the report was completed (for example, the report was invalid or the running user is inactive).
- When an analytic snapshot runs, it can add up to 2000 new records to the target object. Any records over 2000 are recorded in the Row Failures related list. If the `Total Row Number` is blank and the run history indicates "Some rows failed," the report likely contained more than 2000 summaries.
- The details of a failed run are available on the Row Failures related list for 14 days before they are automatically deleted. You cannot retrieve details about row failures from the Recycle Bin.
- If you have a unique field in the target object, and records in the report have more than one of the same value in the column mapped to that unique field, duplicate records are not added. The run history indicates when records are not added to the analytic snapshot.
- If field mappings failed, the snapshot still runs, but the run history shows that there was a partial error.

An analytic snapshot could fail during a scheduled run for a number of reasons. This table lists the errors a failed run may display and how the errors can help you troubleshoot the analytic snapshot so that it will run successfully.

Error	Description
`Running user does not have permission to run reports.`	The user in the `Running User` field does not have the “Run Reports” or “Create and Customize Reports” permission. Choose a user with the appropriate permissions or enable the appropriate permissions for the running user.
`Cannot run analytic snapshot because source report has been deleted.`	The report in the `Source Report` field was deleted and no longer available to run. Choose another source report for your analytic snapshot or restore the deleted report from the Recycle Bin.
`Running user does not have permission to access source report.`	The user in the `Running User` field does not have access to the folder in which the source report is stored. Choose a user with access to the source report or provide the existing running user with access to the folder in which the source report is stored.
`Source report definition is obsolete.`	The report in the `Source Report` field references a custom object that is no longer available for reports or the relationships between the objects in the report have changed.
`Source report definition is invalid.`	The report in the `Source Report` field cannot run because it contains invalid formulas or filter criteria. Update the report so that it can run without errors.
`Running user does not have permission to access report type.`	The user in the `Running User` field does not have permission to access a report type associated with the report in the `Source Report` field. Choose a running user that has the correct permissions or provide the existing running user with the appropriate permissions.
`Source report must be tabular.`	The report in the `Source Report` field is no longer in tabular format. Choose a new source report or update the existing source report's format to tabular.
`Source report last saved with details hidden on report results.`	The report in the `Source Report` field was saved with its details hidden. To display the details of the source report, view the report, click the **Show Details** button, and save the report.
`Target object has been deleted or is inaccessible to running user.`	The custom object in the `Target Object` field has been deleted or the user in the `Running User` field does not have permission to access the target object. Restore the deleted custom object, choose a new target object, or provide the existing running user with “Create” permissions to the custom object in the `Target Object` field. Note that if the custom object's status is `In Development`, the running user must have the “Customize Application” permission to access the target object.
`Running user does not have permission to edit target object.`	The user in the `Running User` field does not have “Create” permissions on the custom object in the `Target Object` field. Choose a running user that has such permissions or

Error	Description
	provide the existing running user with "Create" permissions to the custom object in the `Target Object` field.
`Target object must not be a detail object in a master-detail relationship.`	The custom object in the `Target Object` field is a detail object in a master-detail relationship, meaning that a master object controls certain behaviors on the target object's records. Choose a target object that is not included in a master-detail relationship.
`Target object must not be included in a workflow.`	The custom object in the `Target Object` field is included in a workflow. Choose a target object that is not included in a workflow.
`Target object must not include an insert trigger.`	An Apex trigger runs when new records are created for the custom object in the `Target Object` field. Remove the Apex trigger or choose a target object for which an Apex trigger does not run when new records are created.
`Target object must not include validation rules.`	The custom object in the `Target Object` field contains validation rules. Choose a target object that does not contain validation rules or delete validation rules from the existing target object.
`Running user is inactive.`	The user in the `Running User` field is no longer active. Choose an active user.
`One or more required fields on the target object are not mapped.`	One or more required fields on the target object are not mapped. Map all required fields on the target object to fields on the source report.
`Source report contains too many fields, has a formula field with too many functions, or contains too many criteria.`	The report in the `Source Report` field contains too many fields, criteria, or functions within a formula field. Remove any unnecessary fields, criteria and functions within formula fields from the source report.
`Source report cannot have more than 100 selected columns.`	The report in the `Source Report` field contains more than 100 fields. Remove any unnecessary fields from the source report.
`Target object cannot have more than 100 custom fields.`	The custom object in the `Target Object` field contains more than 100 custom fields. Remove any unnecessary fields from the target object.
`Your report exceeded the time limit for processing.`	The report in the `Source Report` field may contain too much data to process. Reduce the amount of data the report processes when running by limiting the report's date range and remove any unnecessary fields from the source report.
`This Analytic Snapshot Unique Name already exists. Please choose a unique name.`	The new snapshot you are trying to create has the same unique name as that of a existing snapshot.
`A summary field did not return a valid number.`	A summary field in the results has not returned a valid number. For example, the field may have attempted to divide by 0.

Error	Description
	Check your formulas and test for 0 and "null" in calculations if they appear in your data.
`There is a problem with this analytic snapshot. The source report format was changed from tabular to summary. The field mappings in the analytic snapshot are no longer correct. You can change the report format back to tabular or update the field mappings in the snapshot definition.`	The source report format was changed from tabular to summary, which made the field mappings in the analytic snapshot incorrect. To fix this error, either change the report format back to tabular or update the field mappings in the snapshot definition. This error only applies to analytic snapshots with summary reports.
`There is a problem with this analytic snapshot. Source report must be tabular or summary.`	The source report format must be either tabular or summary. Matrix reports cannot be used with analytic snapshots.
`The grouping level you specified in the analytic snapshot is no longer valid. The running user may no longer have access to that field, the grouping level may have been removed from the source report, or the grouping level was never set.`	This error may result when the running user no longer has access to the field specified in the grouping level, or the grouping level was removed from the source report or was never set. This error only applies to analytic snapshots with summary reports. Make sure the running user has access to all necessary fields.

See Also:

Report on Historical Data with Analytic Snapshots
Manage Analytic Snapshots
Creating a Custom Report

Upgrade Report Builder

Available in: **All** Editions except **Database.com**

User Permissions Needed	
To modify report and dashboard settings:	"Customize Application"

We've released an updated version of report builder, the powerful drag-and-drop editor for reports. With this upgrade:

- All profiles get access to the report builder by default. (You may continue to see the "Report Builder" permission in permission sets and profiles and the PermissionSet and Profile objects in the API, though the upgrade overrides those settings.)
- The old report wizard will be available only to users in Accessibility Mode.
- Group and Professional Edition organizations can use report builder.
- You get scatter charts, a new chart type for reports.

Administrators for existing organizations must manually enable this upgrade. New organizations automatically get the latest version of report builder. If you don't see the Report Builder Upgrade section on the User Interface Settings page, the upgrade has already been enabled for your organization. It's important to understand that assigning the "Report Builder" permission to all users through profiles or permission sets isn't the same thing as enabling report builder for your entire organization. To do that, you need to follow the procedure in this topic.

Important: Upgrading **does not affect** any of your existing reports. However, once you upgrade, you can't return to the old report wizard.

To enable report builder for all users:

1. From Setup, click **Customize** > **Reports & Dashboards** > **User Interface Settings**.
2. Review the Report Builder Upgrade section of the page and click **Enable**. If you don't see the button, report builder has already been enabled for your entire organization.
3. Confirm your choice by clicking **Yes, Enable Report Builder for All Users**.

See Also:

Communicate Your Report Data Effectively

Troubleshoot Reports

Use these tips to help solve problems that arise when you're working with reports.

- Why do my chart labels overlap? on page 188
- Why doesn't my report return any data? on page 188
- Why can't I see formula options in report builder? on page 188
- Why doesn't my report return the data I expect? on page 189
- What are some common report limits? on page 189
- Why am I getting an "obsolete report" error message? on page 190
- Improving Report Performance on page 190
- Why is the old role name appearing in the "role hierarchy" trail of my report? on page 191
- Why do I see a trail of roles on Activity or Opportunities reports? on page 191

See Also:

Communicate Your Report Data Effectively
Why do my chart labels overlap?
Why doesn't my report return any data?
Why can't I see formula options in report builder?
Why doesn't my report return the data I expect?
What are some common report limits?
Why am I getting an "obsolete report" error message?
Improve Report Performance
Why is the old role name appearing in the "role hierarchy" trail of my report?
Why do I see a trail of roles on Activity or Opportunities reports?

Why do my chart labels overlap?

Sometimes the labels for your charts can overlap and be difficult to read. There may be too much data in the same space, or the segments or wedges of the chart may be too small.

To fix overlapping labels, try the following:

- **Enlarge the chart.** Change the chart size in the report to large or extra large or make the dashboard column wider.
- **Remove extra grouping levels.** Reduce the number of grouping levels by using a different chart type. For example, horizontal bar charts have fewer values than grouped horizontal bar charts.
- **Use horizontal charts.** Horizontal charts use different spacing than vertical charts. The advantage of the horizontal bar charts is that the chart can be extended vertically to show numerous groupings, though the width is fixed. Depending on chart settings, you can also display Chatter photos.
- **Change the scale.** Set the chart to use larger units. For example, show values as multiples of 1000 or 1000000.
- **Group small values.** Select the `Combine Small Groups into 'Others'` option for pie, donut, and funnel charts.

See Also:

Troubleshoot Reports

Why doesn't my report return any data?

Check with your administrator to make sure you have access to the records you're trying to report on. If you're still not seeing any results in your report, try casting a wider net:

- Show more than your own records. For example, select **Show** > **All accounts**.
- Expand your time frame filters. For example, select All Time for `Range`, or select a broader custom range.
- Choose field filter operators carefully. If you select `Account Owner equals John James`, you limit potential results to exactly “John James.” If you don't see the results you expect, consider expanding the selection by using `Account Owner contains James` instead.
- Check your filter logic. Make sure your combination of conditions isn't excluding all data.

Limiting your report can improve performance, but make sure you're not filtering out the data you want to see.

See Also:

Troubleshoot Reports

Why can't I see formula options in report builder?

If you can't see the **Add Formula** option in the Fields pane of report builder, change your report format to summary, matrix, or joined. Formulas don't show up for tabular reports.

See Also:

Troubleshoot Reports

Why doesn't my report return the data I expect?

If your data doesn't look as you expect, check the following:

Filters

Make sure to include all the data you want. To change a report filter, hover over it and click **Edit** or **Remove**. Your filters display when you run your report; click **Edit** on that page to make additional changes.

Groupings

When you group by a field, you remove it from the details of the report. If you export the report, you see the field, though it does not appear in the detail area.

Fields

After checking your groupings, check your fields. If your report contains multiple related records—for example, an account, its opportunities, and their products—look at the detail pages for the account record, opportunity record, and product line item to ensure that the fields contain data. If the data isn't available in the format you want, work with your Salesforce administrator to add formula fields to get the data. When formula fields are added to an object, they appear in record detail pages and in reports.

Report Type

The report type selected may not be appropriate or the records anticipated may not share the relationship between objects required for the report type. When choosing a report, be sure you understand which fields are available in the report type.

If your report type includes both parent and child objects, but no child fields are used in a report, the report shows parent records whether they have a child record or not.

Hierarchy

Hierarchy options let you drill down to different data sets based on the role or user hierarchy. The selected hierarchy level, or its default role, may affect the data shown.

Note: Hierarchy applies to activity and opportunity reports.

See Also:

Troubleshoot Reports

What are some common report limits?

Here are common report limits. To see a full list of analytics limits, see *Salesforce Limits*.

Here are common report limits.

Feature	Limit	Editions Info
Bucket fields per report	Up to 5 (each bucket field can have 20 buckets)	Available in Enterprise, Unlimited, and Developer Editions.
Matrix reports[1]	Up to 400,000 summarized values	Available in all editions.

Feature	Limit	Editions Info
Scheduled reports per organization [2]	One or two per hour, based on edition	Available in Professional, Enterprise, Unlimited, Developer Editions.
Field filters per report	Up to 20	Available in all editions.
Formulas per report	Up to 5	Available in all editions.
Rows displayed in a report [3]	Up to 2,000	Available in all editions.
Rows displayed in the report builder preview	Up to 20 rows for summary and matrix reports, and up to 50 rows for tabular	Available for all editions.

[1] Data exceeding this limit is not displayed.[2] Hourly limits vary by edition.[3] To view all the rows, export the report to Excel or use the printable view for tabular and summary reports. For joined reports, export is not available, and the printable view displays a maximum of 20,000 rows.

See Also:

Troubleshoot Reports

Why am I getting an “obsolete report” error message?

You may see this error because:

- An object in the report isn’t enabled for reporting anymore.
- A lookup relationship used by objects in the report has been deleted or modified.
- An object in the report has been deleted.
- You don’t have “View” permissions for an object in the report.

See Also:

Troubleshoot Reports

Improve Report Performance

Many factors can cause a report to perform poorly or to time out. Most of them can be addressed by simple changes, such as using the correct filter operators, increasing the number of filters, and reducing the amount of data.

Available in: **All** editions except **Database.com**

Watch this video for quick tips on Making Your Reports Run Faster (3:14 minutes).

A report can take anywhere from a few seconds to several minutes to run. Occasionally, a report is so complex that it exceeds the timeout limit and fails. If the report is slow to load, it's because:

- It is querying too many objects
- It is dealing with intricate lookups
- It has too many fields

If you can't view a report and want to edit it to avoid the time out, you can append `?edit=1` to the report URL to get to edit mode, where you can adjust the criteria. Try these tips to get your reports to run more efficiently.

- When filtering, use the `equals` or `not equal to` operators instead of `contains` or `does not contain`. For example, use `Account Owner equals John James`, not `Account Owner contains John`. Choose **AND** rather than **OR** for filter logic
- Use time frame filters to narrow your report's date range. For example, use `Last 30 Days` instead of `Current FY`.
- Set time frame filters by choosing a `Date Field` and `Range` to view. Only records for that time frame are shown.
- Reduce the number of fields in the report by removing unnecessary columns or fields.
- If you receive an error message that your activity report has too many results, customize the report to include a filter on a picklist, text, or date field. Alternatively, rerun the report using a different activity data type such as "Activities with Accounts" or "Activities with Opportunities".
- Add time filters, scope filters, and filter criteria to the report to further narrow the results.

See Also:

Troubleshoot Reports
Filter Your Report Data
Enter Filter Criteria
Getting the Most Out of Filter Logic

Why is the old role name appearing in the "role hierarchy" trail of my report?

Changes to role name aren't automatically updated in reports. To see the latest role name, change the `Role name as displayed on reports` field for the role record.

See Also:

Troubleshoot Reports

Why do I see a trail of roles on Activity or Opportunities reports?

When you run Activity and Opportunity reports, your organization's hierarchy appears above the results. These filters allow you to display and share data in reports based on different levels in the hierarchy.

For example, if you see **CEO > VP of Global Sales > Sales Operations Director**, you're viewing data for the Sales Operations Director role.

See Also:

Troubleshoot Reports

SHARE INSIGHTS

Share Insights with Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities.

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Watch a Demo: An Overview of Dashboards (3:20 minutes)

Note: Dashboards in Group Edition organizations are view-only.

See Also:

Create a Dashboard
Delete a Dashboard
Choose a Dashboard Running User
Schedule a Dashboard Refresh
Add a Dashboard Component
Modify a Dashboard Component
Provide Individualized Views of a Dashboard
Let Users View Dashboards on the iPad
Edit Dashboards in Accessibility Mode
Why doesn't my dashboard display the data I expect?
Filter Dashboard Data
Create a Dashboard
Get Started with Dashboards
Provide Individualized Views of a Dashboard
How Salesforce Analytics Works

Create a Dashboard

Create a dashboard to provide a graphical view of the data in your reports.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create dashboards:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you created:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you didn’t create:	“Run Reports,” “Manage Dashboards,” AND “View All Data”
To create, edit, and delete dynamic dashboards:	“Run Reports” AND “Manage Dynamic Dashboards”

Tip: You can clone a dashboard to quickly create a new dashboard with the same properties and components as the one you're viewing. Just click **Clone**, modify the dashboard settings, and save.

1. Create the custom reports containing the data you want to display.

   Important: Be sure to store these reports in folders that your intended dashboard viewers can access.

2. Click the Dashboards tab.
3. Click **Go To Dashboard List**.
4. Click **New Dashboard** to create a new dashboard.

   To modify an existing dashboard, click its name from the list.
5. Customize your dashboard and click **Save**.

See Also:

Share Insights with Dashboards
Delete a Dashboard
Install the CRM Sample Dashboards from AppExchange

Delete a Dashboard

It’s a good idea to delete dashboards that you no longer need.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To delete dashboards:	“Run Reports” AND “Manage Dashboards”
To delete dashboards created by another user:	“Manage Dashboards” AND “Modify All Data”

Deleting a dashboard also deletes the components within it. It doesn't delete the custom reports used by the components.

Deleted dashboards are moved to the Recycle Bin.

1. Click the Dashboards tab.

2. Click **Go To Dashboards List**.
3. Choose the folder where the dashboard is stored.
4. Click **Del** next to the name of the dashboard.

See Also:

Share Insights with Dashboards

Choose a Dashboard Running User

Select a *running user* to specify which data to display in a dashboard.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, edit, and delete dashboards:	"Run Reports" AND "Manage Dashboards"
To create, edit, and delete dynamic dashboards:	"Run Reports" AND "Manage Dynamic Dashboards"
To enable choosing a different running user for the dashboard:	"View My Team's Dashboards" OR "View All Data"

Each dashboard has a *running user*, whose security settings determine which data to display in a dashboard.

If you have "View All Data," you can choose any user in your organization to be a running user of the dashboard. If you have "View My Team's Dashboards," you can choose any user below you in the role hierarchy.

Note: Dashboard components that use Visualforce ignore the running user; content displays only if the viewing user has access to the Visualforce page. Other components in the dashboard are not affected.

Users with a Salesforce Platform or Salesforce Platform One user license can only view a dashboard if the dashboard running user also has the same license type. Consider creating separate dashboards for users with different license types.

1. Edit a dashboard.
2. Click the button next to the `View dashboard as` field.

   Note: If you don't have "Manage Dynamic Dashboards" permission, just enter a running user and skip to the final step. Enter "*" to see all available users.

3. Choose a running user setting.
   - **Run as specified user.** The dashboard runs using the security settings of that single, specific user. All users with access to the dashboard see the same data, regardless of their own personal security settings. This approach is perfect for sharing the big picture across a hierarchy, or motivating team members by showing peer performance within a team. If you don't have "View All Data," you can only choose yourself. If you have "View My Team's Dashboards," you can choose any user below you in the role hierarchy.

- **Run as logged-in user.** A *dynamic dashboard* runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level. This approach helps administrators share one common set of dashboard components to users with different levels of access.

4. Optionally, select `Let authorized users change running user` to enable those with permission to change the running user on the dashboard view page.
   - Users with “View My Team's Dashboards” can view the dashboard as any user below them in the role hierarchy.
   - Users with “View All Data” can view the dashboard as any user in their organization.

   Note: If you have“View All Data” or “View My Team's Dashboards,” you can preview the dashboard *edit* page as a different user, but you must select `Let authorized users change running user` to change the running user from the dashboard *view* page.

5. Click **OK**.
6. In the `View dashboard as` field, enter a running user.
7. Save your dashboard.

See Also:

Share Insights with Dashboards

Schedule a Dashboard Refresh

In Enterprise Edition and Unlimited Edition, you can schedule dashboards to refresh daily, weekly, or monthly.

Available in: **Enterprise** and **Unlimited** Editions

User Permissions Needed	
To schedule and email a dashboard refresh:	“Schedule Dashboards”
To delete the schedule to refresh a dashboard:	“Modify All Data”

Note: Users with the “View Setup and Configuration” permission can view all the dashboards scheduled to refresh for your organization on the All Scheduled Jobs page. To view the All Scheduled Jobs page, from Setup, click **Monitoring** > **Scheduled Jobs** or **Jobs** > **Scheduled Jobs**. Users with “Modify all Data” permission can click **Del** next to a specific scheduled dashboard refresh to permanently delete all instances of the scheduled refresh.

You can also set up Salesforce to send an email with an HTML version of the dashboard when the refresh completes. For email applications that don't support HTML, the email includes text and a link to the dashboard.

1. On the Dashboards tab, select a dashboard using the `View Dashboard` field.
2. Click **Refresh** and choose **Schedule Refresh**

   Scheduling or emailing a filtered dashboard returns unfiltered data.

   Each dashboard has a *running user*, whose security settings determine which data to display in a dashboard.

Note: If the running user becomes inactive, the report is not run. The system administrator receives an email notification to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.

3. Select notification settings.

- Click `To me` to send an email to your user's address.
- Click `To others...` to send an email to additional Salesforce users.

  Note: Portal users receive report and dashboard refresh email notifications when the `Allow Reports and Dashboards to Be Sent to Portal Users` option is enabled.

- Dashboard refresh notifications may not display properly in Outlook 2007.
- In HTML-formatted dashboard refresh notifications, users can click the name of the dashboard to log in to Salesforce and view the dashboard.
- To send a dashboard refresh notification to other users, store the dashboard in a public folder with access granted to others. Other users can't access dashboards in your personal folders. To add a dashboard to a public folder, edit the dashboard properties.
- Users can click components in a dashboard refresh notification to view the source report in Salesforce.
- Dashboard components that include Visualforce pages and s-controls may not display in dashboard refresh notifications. Users must view them in Salesforce.
- Dashboard refresh notifications can be viewed offline in email clients.
- If a dashboard has filters, only the unfiltered version is emailed.
- By default, Salesforce sends images in dashboard emails as `.png` (Portable Network Graphic) files, which are not supported in Lotus Notes. When you enable the `Use Images Compatible with Lotus Notes in Dashboard Emails` > option, Salesforce uses `.jpg` images, which Lotus Notes supports, when sending dashboard emails. The "Schedule Dashboard" permission is required to view this option.

  Note: Dashboard emails that contain images compatible with Lotus Notes are substantially larger and the image quality may be lower.

4. Schedule the refresh.

   a. Set the `Frequency` field.

      Click the `Daily`, `Weekly`, or `Monthly` fields to show more options.

      The total number and frequency of your scheduled dashboard refreshes depends on your Salesforce edition. Enterprise and Unlimited editions can have up to 200 scheduled dashboard refreshes. Unlimited Edition users can schedule up to two dashboard refreshes an hour per day. Enterprise Edition users can schedule up to one dashboard refresh an hour per day. Additional scheduled dashboards may be available for purchase. Contact your salesforce.com representative for information.

   b. Specify dates in the `Start` and `End` fields.

      Dashboards refresh in the time zone of the user who scheduled the refresh. For example, if the `Time Zone` field on your user record is set to Pacific Standard Time (PST), and you schedule a dashboard to refresh every day at 2:00 PM, then the dashboard will refresh every day between 2:00 PM and 2:29 PM PST.If you view and save a schedule in a time zone different from the one in which it was previously scheduled, the time slot could potentially change.

   c. Under `Preferred Start Time`, click **Find available options...** to choose a time.

The dashboard refresh runs within 30 minutes of your preferred start time. For example, if you select 2:00 PM, the refresh may happen any time between 2:00 PM and 2:29 PM, depending on availability.

Note: Your preferred start time may not be available if other users have already selected it.

- If you schedule a dashboard to refresh on a specific day of every month, it only refreshes on months that have that specific day. For example, if you schedule a refresh for the 31st of every month, the dashboard won't refresh on 30-day months. To refresh on the last day of every month, choose “Last” from the `On day of every month` drop-down list.
- Dashboards won't refresh as scheduled if the running user doesn't have access to the dashboard folder.
- If a dashboard has filters, only the unfiltered version is refreshed.
- You can't schedule refreshes for dynamic dashboards. They must be refreshed manually.

5. Click **Save**.

To delete a scheduled dashboard refresh, click **Refresh** > **Schedule Refresh** > **Unschedule Dashboard**.

The scheduled refresh is permanently deleted, and not sent to the Recycle Bin. Deleting the scheduled refresh does not affect the dashboard itself.

See Also:

Share Insights with Dashboards
Apply a Dashboard Filter
Refresh Dashboard Data

Add a Dashboard Component

Add components by dragging a component type onto the dashboard, then dropping a data source (report, s-control, or Visualforce page) onto it.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

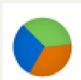
User Permissions Needed	
To create dashboards:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you created:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you didn’t create:	“Run Reports,” “Manage Dashboards,” AND “View All Data”
To create, edit, and delete dynamic dashboards:	“Run Reports” AND “Manage Dynamic Dashboards”

1. On the dashboard where you want to add a component, click **Edit**.

   You can continue to edit the dashboard while components and data sources are loading.
2. Drag the component type you want from the Components tab onto your dashboard.

Tip: You can also drop the data source first, then drop a component type onto it.

To select the kind of component you need, consider the type of data you’re showing and the uses it will serve.

	Use a chart when you want to show data graphically. You can choose from a variety of chart types.
	Use a gauge when you have a single value that you want to show within a range of custom values
	Use a metric when you have one key value to display. • Enter metric labels directly on components by clicking the empty text field next to the grand total. • Metric components placed directly above and below each other in a dashboard column are displayed together as a single component.
	Use a table to show a set of report data in column form.
Visualforce Page	Use a Visualforce page when you want to create a custom component or show information not available in another component type.
Custom S-Control	Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML Web form.

3. Drag a report from the Data Sources tab onto the component you just dropped on the dashboard.

- You can show a joined report that includes a chart on a dashboard. Edit the joined report dashboard component and select **Use chart as defined in the source report**.
- If the dashboard has a filter, the data source must contain the filter field or an equivalent. If it doesn't, the filter may not work.
- Some custom forecast and lead reports aren't available for dashboards.
- For Visualforce components, the data source must be a Visualforce page.

Tip: Each folder can contain up to 200 data sources. To home in on the right data source quickly, try Quick Find or the **Recent**, **My**, and **All** filters.

4. Click on your dashboard component.

5. On the Component Data tab, choose which summary fields and groupings in the underlying report you want to display in your component.

Tip: Make more fields available for a dashboard component by adding them to the source report chart.For example, create a combination chart on the report using vertical columns and lines. The additional groupings in the report chart are available to use in dashboard components.

6. On the Formatting tab, specify how your component shows its data.

Your formatting choices depend on the component type you choose.

Note: For Visualforce pages and s-controls, set the `Height`.

7. Click **OK**.
8. Drag, drop and click to rearrange components on the dashboard.
   - Grab components by the header bar and drag them to the right location on the dashboard.
   - Click ✖ for a data source to remove it from the component.
   - Click ✖ for a component to remove it from the dashboard.
   - Click component header, title, and footer fields to edit them.
   - Change colors for picklist values displayed in dashboard components. You need the "Customize Application" permission to update picklists.
   - Optionally, for filtered dashboards, choose a different field in the `Filtered By` drop-down.

See Also:

Share Insights with Dashboards

Modify a Dashboard Component

A dashboard component is a visual representation of the data in a report. You can change where the component's data comes from, what the data looks like in the component, and what kind of component it is.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To edit and delete dashboards you created:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you didn't create:	"Run Reports," "Manage Dashboards," AND "View All Data"
To create, edit, and delete dynamic dashboards:	"Run Reports" AND "Manage Dynamic Dashboards"

Dashboard builder is a drag-and-drop interface for creating and modifying dashboards. Drag, drop and click to rearrange components on the dashboard. Hover details and drill-down are available when you view and not when you edit a dashboard.

See Also:

Share Insights with Dashboards
Make Fields Available in a Dashboard Component
Choose Where Users Go When Clicking a Dashboard Component
Create a Custom Four-Column Table
Dashboard Component Types
Chart Types
Data Settings for Dashboard Chart Components
Visual Settings for Dashboard Chart Components
Add a Dashboard Filter

Make Fields Available in a Dashboard Component

Make more fields available for a dashboard component by adding them to the source report chart.

For example, create a combination chart on the report using vertical columns and lines. The additional groupings in the report chart are available to use in dashboard components.

See Also:

Modify a Dashboard Component

Choose Where Users Go When Clicking a Dashboard Component

You can edit a dashboard component so that when users click the component, they can drill down to the source report, filtered report, record detail page, or other URL.

Edit a component and set the `Drill Down to` option on the Component Data tab. Choose one of these options:

- Source Report—Takes the user to the full source report for the dashboard component.
- Filtered Source Report—When users click individual groups, X-axis values, or legend entries, they are taken to the source report filtered by what they clicked.

  For example, if you had a stacked vertical column chart of opportunities grouped by stage, with months as the X-axis, you could click an individual stage in a bar, a month on the X-axis, or a legend entry for a stage to drill down to the filtered source report. (Not available for gauges, metrics, or tables.)
- Record Detail Page—When users click chart or table elements, axis values, or legend entries, they are taken to the detail page for that record. You can only choose this option for tables and charts that use a source report grouped by record name, record owner, or feed post. (Not available for gauges or metrics.)
- Other URL—Takes the user to the URL that you specify. You can't add URLs that begin with “mailto:” or “javascript:” to dashboard components.

See Also:

Modify a Dashboard Component

Create a Custom Four-Column Table

You can use the default two-column table or create a custom table with up to four columns and totals.

Customized tables allow null values in the results. Default two-column tables do not.

To customize a table, the source report must be summary or matrix format and contain a chart. To create a four-column table, edit a table component on a dashboard and click the **Customize Table** link.

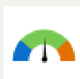
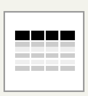
Specify up to four columns to display in the table. Available columns can be any grouping or summary field used in the chart. Update the report's chart or groupings to make more columns available for the dashboard table. Make sure to select a numeric field for one of the columns. For example, create a combination chart on the report using vertical columns and lines. The additional groupings in the report chart are available to use in dashboard components.

See Also:

Modify a Dashboard Component

Dashboard Component Types

Dashboard components can be charts, tables, gauges, metrics, or other components that you can create with VisualForce.

Component Type	Image	Description
Chart		Use a chart when you want to show data graphically. You can choose from a variety of chart types.
Gauge		Use a gauge when you have a single value that you want to show within a range of custom values. For example, to create a dashboard that measures where your current closed opportunity amounts fall within a range of values, set the `Minimum Value`, `Breakpoint #1 Value`, `Breakpoint #2 Value`, and `Maximum Value` for the gauge. The ranges that you set can indicate poor, acceptable, and good performance. Set appropriate colors for each of these ranges to visually indicate progress. To create a gauge with only two ranges, leave `Breakpoint #2 Value` blank. Select `Show Percentage` or `Show Total` to display those values on the gauge. Values exceeding the maximum are shown as greater than 100%.
Metric		Use a metric when you have one key value to display. For example, if you have a report showing the total amount for all opportunities in the `Closed`, `Commit`, and `Base Case` stages in the current month, you can name that value and use it as a revenue target for the month displayed on the dashboard.
Table		Use a table to show a set of report data in column form. For example, to see the top 20 opportunities by amount, set `Maximum Values Displayed` to `20`, click **Customize Table** and select opportunity name, amount, and other columns to display, choose the sort order, and set conditional highlighting. Available columns include all chart groupings and report summary fields, as well as the second-level grouping defined in the report.
Visualforce Page	N/A	Use a Visualforce page when you want to create a custom component or show information not available in another component type. For example, a Visualforce page can display data from an external system or show Salesforce data in a custom way. Visualforce pages must meet certain requirements to be displayed in dashboards; otherwise, they don't appear in the `Visualforce Page` drop-down list. See Creating Visualforce Dashboard Components.

Component Type	Image	Description
Custom S-Control	N/A	Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML Web form. **Important:** S-controls have been superseded by Visualforce pages. Organizations that haven't previously used s-controls can't create them. Existing s-controls are unaffected, and can still be edited.

See Also:

Modify a Dashboard Component
Modify a Dashboard Component

Chart Types

You can show data in reports and dashboards in the form of bars, columns, lines, shapes, or other elements. Which is right depends on what the data is about and what you want to show with it.

See Also:

Modify a Dashboard Component
Bar Charts
Column Charts
Line Charts
Pie Charts
Donut Charts
Funnel Charts
Scatter Charts
Scatter Charts
Modify a Dashboard Component
Create a Custom Report in Accessibility Mode
Show Different Data Sets in One Chart
Data Settings for Dashboard Chart Components
Visual Settings for Dashboard Chart Components

Bar Charts

A bar chart shows values as horizontal lengths, so this format can be good for comparing distance or time. Use a bar chart when you have a summary report with a single grouping, or you only want to display one grouping.

Available in: **All** editions except **Database.com**

For example, to see the amount in each sales stage in a report, select `Sum of Amount` as the `X-axis` and `Stage` as the `Y-axis`. The chart displays one bar for each stage, with the length proportional to the total opportunity amount.

The advantage of the horizontal bar charts is that the chart can be extended vertically to show numerous groupings, though the width is fixed. Depending on chart settings, you can also display Chatter photos.

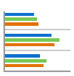
See Also:

Chart Types
Grouped Bar Charts
Stacked Bar Charts
Bar Charts Stacked to 100%
Data Settings for Dashboard Bar and Column Chart Components
Formatting Settings for Dashboard Bar Chart Components

Grouped Bar Charts

Use a grouped bar chart when you have multiple groupings, and you want to compare values within a secondary grouping, but not the totals.

Available in: **All** editions except **Database.com**



For example, to compare the amount of deals closed each month by lead source in a report, set amount as the `X-axis`, source as the `Y-axis`, and closing month as the `Groupings` value. The chart displays a set of bars for each source, one bar for each month. The monthly differences within a particular source are easy to compare.

You can also compare a given month across sources, but comparing the total number of leads for each source may be difficult.

Tip: Use a stacked chart to compare totals.

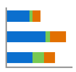
See Also:

Bar Charts
Stacked Bar Charts
Bar Charts Stacked to 100%

Stacked Bar Charts

Use a stacked bar chart when you have multiple groupings and are interested in the proportions between values in each grouping, as well as each grouping's total.

Available in: **All** editions except **Database.com**



For example, to compare the status of leads by campaign in a report, and also to compare the totals for each status, set record count as the `X-axis`, status as the `Y-axis`, and campaign as the `Groupings` value. The chart displays a single bar for each status, broken down by campaign, with each campaign shown in a different color.

The proportion of each campaign in each status is easy to compare, as are the totals for each status, but comparing a single campaign's contribution to different statuses, or to the total, may be difficult.

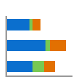
See Also:

Bar Charts
Grouped Bar Charts
Bar Charts Stacked to 100%
Column Charts
Grouped Column Charts
Stacked Column Charts
Column Chart Stacked to 100 Percent

Bar Charts Stacked to 100%

Use a bar chart stacked to 100 percent when you have multiple groupings and are interested in the proportions between values in each grouping, as well as each grouping's total.

Available in: **All** editions except **Database.com**



For example, to compare the status of leads by campaign in a report, and also to compare the totals for each status, set record count as the `X-axis`, status as the `Y-axis`, and campaign as the `Groupings` value. The chart displays a single bar for each status, broken down by campaign, with each campaign shown in a different color.

The proportion of each campaign in each status is easy to compare, as are the totals for each status, but comparing a single campaign's contribution to different statuses, or to the total, may be difficult.

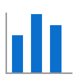
See Also:

Bar Charts
Grouped Bar Charts
Stacked Bar Charts

Column Charts

A column chart is very much like a bar chart, but it can be a better format for showing relative counts of things, such as leads or dollars. Use a column chart when you have a summary report with a single grouping, or you only want to display one grouping.

Available in: **All** editions except **Database.com**



For example, to see the number of leads by lead source in a report, set record count as the `Y-axis` and source as the `X-axis`. The chart displays one column for each source, with the height proportional to the total number of leads. The width of column charts is constrained by dashboard column size and report chart size. Horizontal bar charts may be better for large numbers of groupings. Column charts are good when showing values by date, since dates traditionally run along the X-axis.

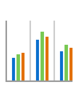
See Also:

Chart Types
Grouped Column Charts
Stacked Column Charts
Stacked Bar Charts
Column Chart Stacked to 100 Percent

Grouped Column Charts

Use a grouped column chart when you have multiple groupings, and you want to compare values within a secondary grouping, but not the totals.

Available in: **All** editions except **Database.com**



For example, to compare the number of opportunities created each month by campaign source in a report, set record count as the `Y-axis`, created month as the `X-axis`, and source as the `Groupings` value. The chart displays a set of bars for each month, one bar for each campaign source. The differences between sources within a particular month are easy to compare.

You can also compare a particular source across months, but comparing the total number of opportunities for each month may be difficult.

Tip: Use a stacked chart to compare totals.

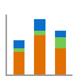
See Also:

Column Charts
Stacked Column Charts
Stacked Bar Charts
Column Chart Stacked to 100 Percent

Stacked Column Charts

Use a stacked column chart when you have multiple groupings and you're interested in the proportions between values in each grouping, as well as each grouping's total.

Available in: **All** editions except **Database.com**



For example, to compare the number of opportunities created each month by campaign source in a report, and also to compare the totals for each month, set record count as the `Y-axis`, created month as the `X-axis`, and source as the `Groupings` value. The chart displays a single bar for each month, broken down by source, with each source shown in a different color.

The proportion of each source in each month is easy to compare, as are the monthly totals, but comparing a single source's contribution to different months, or to the total, may be difficult.

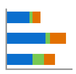
See Also:

Column Charts
Grouped Column Charts
Stacked Bar Charts
Column Chart Stacked to 100 Percent

Stacked Bar Charts

Use a stacked bar chart when you have multiple groupings and are interested in the proportions between values in each grouping, as well as each grouping's total.

Available in: **All** editions except **Database.com**



For example, to compare the status of leads by campaign in a report, and also to compare the totals for each status, set record count as the `X-axis`, status as the `Y-axis`, and campaign as the `Groupings` value. The chart displays a single bar for each status, broken down by campaign, with each campaign shown in a different color.

The proportion of each campaign in each status is easy to compare, as are the totals for each status, but comparing a single campaign's contribution to different statuses, or to the total, may be difficult.

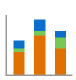
See Also:

Bar Charts
Grouped Bar Charts
Bar Charts Stacked to 100%
Column Charts
Grouped Column Charts
Stacked Column Charts
Column Chart Stacked to 100 Percent

Column Chart Stacked to 100 Percent

Use a column chart stacked to 100 percent when you have multiple groupings and are interested in the proportions between values in each grouping, as well as each grouping's total.

Available in: **All** editions except **Database.com**



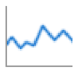
For example, to compare the number of opportunities created each month by campaign source in a report, and also to compare the totals for each month, set record count as the `Y-axis`, created month as the `X-axis`, and source as the `Groupings` value. The chart displays a single bar for each month, broken down by source, with each source shown in a different color. The proportion of each source in each month is easy to compare, as are the monthly totals, but comparing a single source's contribution to different months, or to the total, may be difficult.

See Also:

Column Charts
Grouped Column Charts
Stacked Column Charts
Stacked Bar Charts

Line Charts

Line charts are good for showing changes in the value of an item over a series of points in time, such as week to week or quarter to quarter. Use a line chart when you have one important grouping representing an ordered set of data and one value to show.



Line charts are useful for showing data over time. For example, to see the numbers of leads created each month in a report, set record count as the `Y-axis` and created month for the `X-axis`. The chart displays a line connecting the record count totals for each month. Salesforce does not plot missing (null) values.

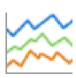
If a missing value occurs in the middle of a data set, Salesforce displays a gap in the line.

See Also:

Chart Types
Grouped Line Charts
Cumulative Line Charts
Grouped Cumulative Line Charts

Grouped Line Charts

Use a grouped line chart when you have multiple groupings—each with one important secondary grouping representing an ordered set of data—and one value to show.



For example, to see monthly leads by lead source in a report, set record count as the `Y-axis`, created month as the `X-axis`, and source as the `Groupings` value. The chart displays a line for each source, connecting that source's record count totals for each month. Each line spans the earliest to the latest month containing data. Comparing the total numbers for each month may be difficult.

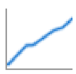
Salesforce does not plot missing (null) values. If a missing value occurs in the middle of a data set, Salesforce displays a gap in the line.

See Also:

Line Charts
Cumulative Line Charts
Grouped Cumulative Line Charts

Cumulative Line Charts

Use a cumulative line chart when you have one important grouping representing an ordered set of data and one value to show, summed over time.



For example, to see the total amount of closed opportunities by day in the current month in a report, set amount as the `Y-axis` and closing day as the `X-axis`. The chart displays one line, with the line's height representing the cumulative amount of closed opportunities up to and including that day. You can't see the amount for any single day—only the cumulative amount.

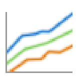
If the data set contains a missing (null) value, Salesforce continues the line using the previous value in the data set.

See Also:

Line Charts
Grouped Line Charts
Grouped Cumulative Line Charts

Grouped Cumulative Line Charts

Use a cumulative line chart when you have one important grouping representing an ordered set of data and one value to show, summed over time.Use a grouped line chart when you have multiple groupings—each with one important secondary grouping representing an ordered set of data—and one value to show.



For example, to see the total amount of closed opportunities by day for each of the last three months in a report, set amount as the `Y-axis`, closing day as the `X-axis`, and closing month as the `Groupings` value. The chart displays a line for each month, with the line's height representing the cumulative amount of closed opportunities up to and including that day.

See Also:

Line Charts
Grouped Line Charts
Cumulative Line Charts

Pie Charts

Use a pie chart when you have multiple groupings and want to show the proportion of a single value for each grouping against the total.

For example, to see the breakdown of your case queue by case status in a report, set record count for `Values` and status for `Wedges`. The chart displays a circle made up of wedges, each wedge representing the cases in a case status. Wedge size is proportional to the numbers of cases.

Pie charts are not ideal for comparing values that are close together or numerous small values.

Select `Show Labels`, `Show Values`, or `Show Wedge %` to include that information on the chart. (Only available with Chart Analytics 2.0.)

See Also:

Chart Types

Donut Charts

Use a donut chart when you have multiple groupings and want to show not only the proportion of a single value for each grouping against the total, but also the total amount itself.

For example, to see the breakdown of your case queue by case status in a report, as well as the total number of cases, set record count for `Values` and status for `Wedges`. The chart displays a donut made up of wedges, each wedge representing a case status. Wedge size is proportional to the numbers of cases. The total number of cases for all statuses is shown in the middle.

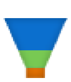
Select `Show Labels`, `Show Values`, `Show Wedge %`, or `Show Total` to include that information on the chart.

See Also:

Chart Types

Funnel Charts

Use a funnel chart when you have multiple groupings in an ordered set and want to show the proportions among them.



For example, to see the amount of opportunities in each stage in a report, set amount for `Values` and stage for `Segments`. Since the `Opportunity: Stage` field is an ordered picklist, the stages are sorted in the same order as the picklist, with each segment representing the amount for that stage. Funnel charts are useful for showing the flow of opportunities through the stages; a substantially larger segment may indicate a bottle-neck at that stage.

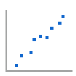
Select `Show Labels`, `Show Values`, or `Show Segment %` to include that information on the chart.

See Also:

Chart Types

Scatter Charts

Use scatter charts to show meaningful information using one or two groups of report data plus summaries.

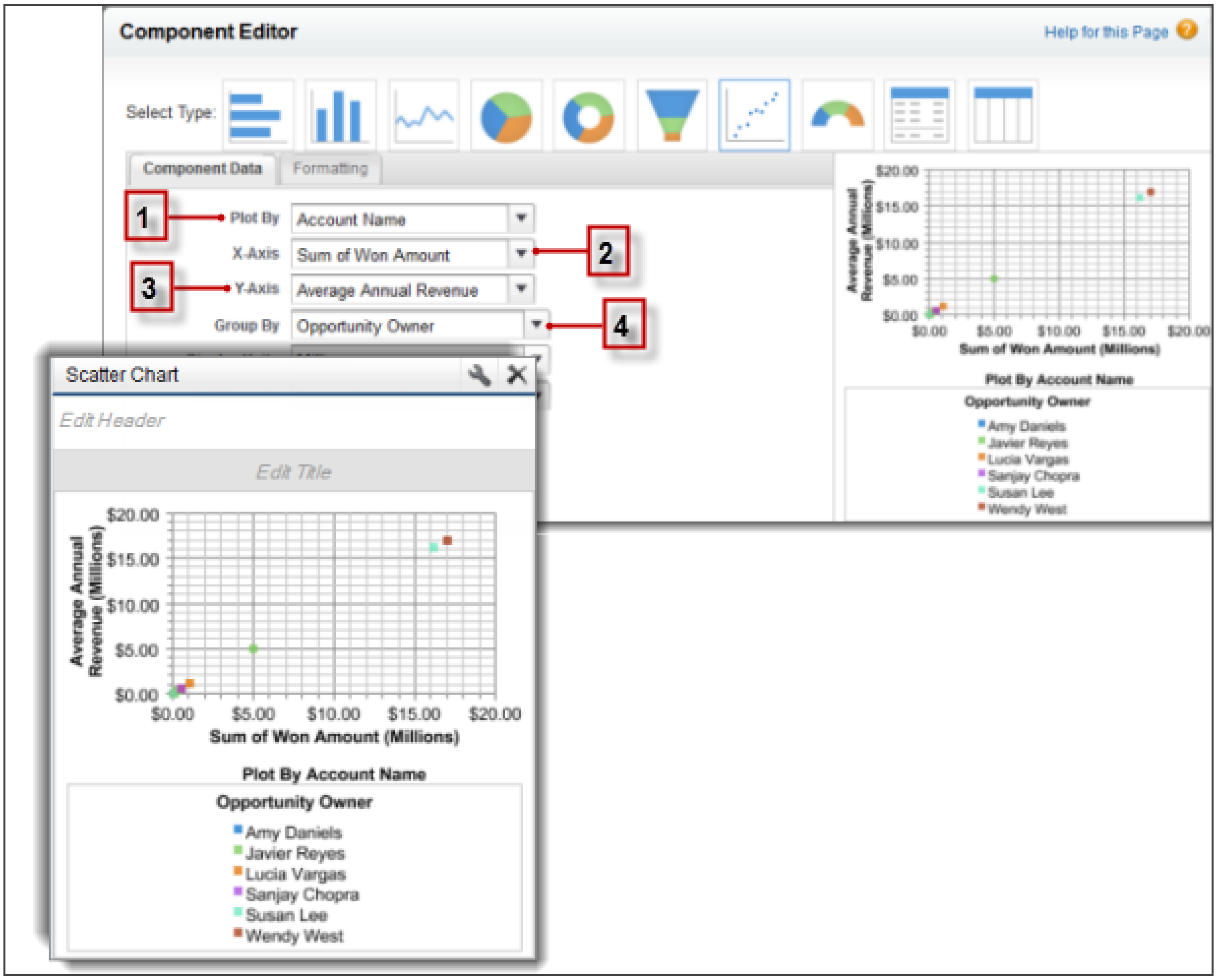


For example, to see how stage duration correlates with the number of activities for opportunities, group your report by `Opportunity Name` and plot the scatter chart by the grouping. Then set `X-Axis` on the chart to `Record Count` and `Y-Axis` to `Stage Duration`. The chart will show a dot for each opportunity. You can tell at a glance if the stage duration is shorter for opportunities that have more activities.

Because a scatter chart shows data grouped by summarized values, you need at least one grouping in your report. Choose a report format that allows groupings, such as, summary, matrix, or joined. You also need at least one summarized field in the report to show data on the axes of the chart. Otherwise, the chart will show record count on the axes. Scatter charts automatically show data from the source report or you can manually choose what information to display for groupings and summaries.

If your source report has	The X-axis automatically displays	The Y-axis automatically displays
No summary fields	Record count.	Record count.
One or more summary fields	First summary.	• Either record count or the second summary in report charts. • The first summary in dashboard charts even if the source report has multiple summaries. But you can manually choose a different summary to show on the axis.

This is a report on closed won opportunities grouped by account and opportunity owner. A scatter chart can reveal the potential for tapping into accounts with a higher annual revenue.



This chart builds on some key fields:

1. **Plot By** automatically chooses the first report grouping. We manually chose the second grouping to show opportunities won by `Account Name`.
2. **X-axis** shows record count when there are no summarized fields or autoselects the first summary field. Since summary is more useful, the chart shows `Sum of Won Amount`.
3. **Y-axis** here shows a manually selected summary field, `Average Annual Revenue`.
4. **Group By** is not set by default. Since the report has another grouping, the chart groups data further by the manually selected `Opportunity Owner` grouping. The colored dots in the chart and legend show this grouping.

The scatter chart component type in dashboards has these limitations:

- It doesn't show tabular reports.
- You can't sort by labels or values.
- You can only change how Y-axis units are displayed.

- You can manually define the range for Y-axis alone.

See Also:

Chart Types
Data Settings for Dashboard Chart Components
Chart Types
Modify a Dashboard Component
Data Settings for Dashboard Scatter Chart Components
Formatting Settings for Dashboard Scatter Chart Components
Data Settings for Dashboard Scatter Chart Components
Formatting Settings for Dashboard Scatter Chart Components

Data Settings for Dashboard Chart Components

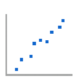
Choose the data you want to show on your report or dashboard chart. The chart automatically selects groupings and summary values from your report. You can override some of those choices to focus on the data you need to share.

See Also:

Modify a Dashboard Component
Scatter Charts
Data Settings for Dashboard Bar and Column Chart Components
Data Settings for Dashboard Funnel Chart Components
Data Settings for Dashboard Scatter Chart Components
Data Settings for Dashboard Gauge Components
Data Settings for Dashboard Line Chart Components
Data Settings for Dashboard Metric Components
Data Settings for Dashboard Pie and Donut Chart Components
Data Settings for Dashboard Table Components

Scatter Charts

Use scatter charts to show meaningful information using one or two groups of report data plus summaries.

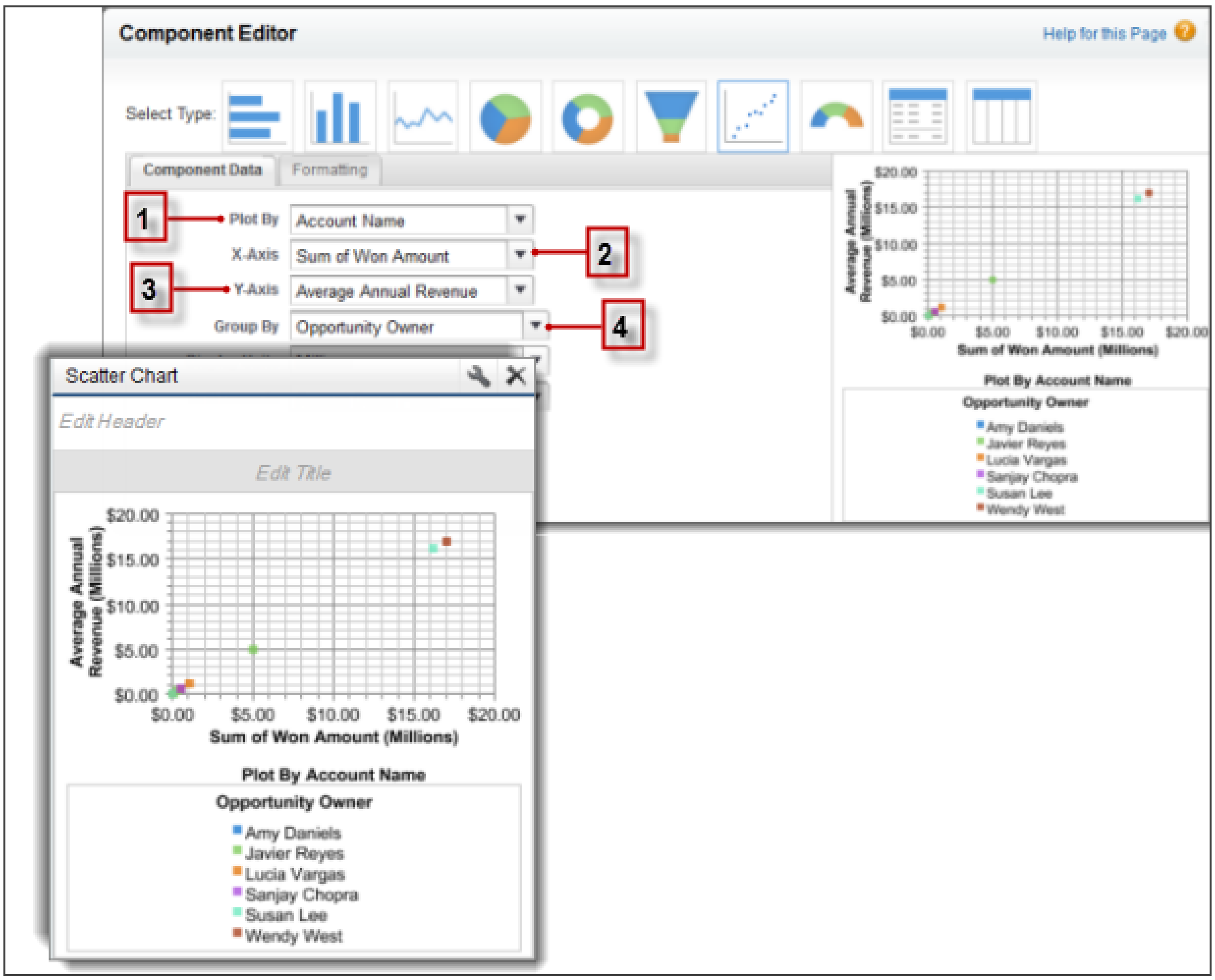


For example, to see how stage duration correlates with the number of activities for opportunities, group your report by `Opportunity Name` and plot the scatter chart by the grouping. Then set `X-Axis` on the chart to `Record Count` and `Y-Axis` to `Stage Duration`. The chart will show a dot for each opportunity. You can tell at a glance if the stage duration is shorter for opportunities that have more activities.

Because a scatter chart shows data grouped by summarized values, you need at least one grouping in your report. Choose a report format that allows groupings, such as, summary, matrix, or joined. You also need at least one summarized field in the report to show data on the axes of the chart. Otherwise, the chart will show record count on the axes. Scatter charts automatically show data from the source report or you can manually choose what information to display for groupings and summaries.

If your source report has	The X-axis automatically displays	The Y-axis automatically displays
No summary fields	Record count.	Record count.
One or more summary fields	First summary.	• Either record count or the second summary in report charts. • The first summary in dashboard charts even if the source report has multiple summaries. But you can manually choose a different summary to show on the axis.

This is a report on closed won opportunities grouped by account and opportunity owner. A scatter chart can reveal the potential for tapping into accounts with a higher annual revenue.



This chart builds on some key fields:

1. **Plot By** automatically chooses the first report grouping. We manually chose the second grouping to show opportunities won by `Account Name`.

2. **X-axis** shows record count when there are no summarized fields or autoselects the first summary field. Since summary is more useful, the chart shows `Sum of Won Amount`.
3. **Y-axis** here shows a manually selected summary field, `Average Annual Revenue`.
4. **Group By** is not set by default. Since the report has another grouping, the chart groups data further by the manually selected `Opportunity Owner` grouping. The colored dots in the chart and legend show this grouping.

The scatter chart component type in dashboards has these limitations:

- It doesn't show tabular reports.
- You can't sort by labels or values.
- You can only change how Y-axis units are displayed.
- You can manually define the range for Y-axis alone.

See Also:

Chart Types
Data Settings for Dashboard Chart Components
Chart Types
Modify a Dashboard Component
Data Settings for Dashboard Scatter Chart Components
Formatting Settings for Dashboard Scatter Chart Components
Data Settings for Dashboard Scatter Chart Components
Formatting Settings for Dashboard Scatter Chart Components

Data Settings for Dashboard Bar and Column Chart Components

Horizontal bar and vertical column charts are useful for comparing the values of one or more report groupings. Use the Component Data tab to select the groupings and summaries you want your bar or column chart to display.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Choose what values to display on the axes of your chart. Depending on the chart type, axis values can be record count, summary fields, or groupings defined in the report. For example, to see the amount in each sales stage in a report, select `Sum of Amount` as the `X-axis` and `Stage` as the `Y-axis`. The chart displays one bar for each stage, with the length proportional to the total opportunity amount.

Setting	Description
`X-Axis`	Choose what values to display on the horizontal axis of your bar, column, scatter, or line chart. Depending on the chart type, axis values can be summary fields or groupings. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. If the X-axis corresponds to a custom summary formula that has the `Where Will this Formula Be Displayed?` option set to a grouping level other than `All summary levels`, then the Y-axis and Groupings selection must correspond to that custom summary formula's grouping level.
`Y-Axis`	Choose what values to display on the vertical axis of your bar, column, scatter, or line chart. Depending on the chart type, axis values can be summary fields or groupings. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values

Setting	Description
	used by the chart. If the Y-axis corresponds to a custom summary formula that has the `Where Will this Formula Be Displayed?` option set to a grouping level other than `All summary levels`, then the X-axis and Groupings selection must correspond to that custom summary formula's grouping level.
`Group By`	Choose how to group information on your chart. This option is available only if the underlying report has more than one grouping. To use the second grouping or summary field defined in the source report's chart, select `Auto`.
`Combination Chart`	Select this option to plot additional values on this chart. The chart type you chose must allow combination charts.
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Dashboard Bar Chart Components

Data Settings for Dashboard Funnel Chart Components

Funnel charts are useful for showing the flow of opportunities through stages.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Choose what values to display on the axes of your chart. Depending on the chart type, axis values can be record count, summary fields, or groupings defined in the report.

Setting	Description
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.
`Values`	Choose what to display as values for your pie chart, donut chart, funnel chart, gauge, or metric. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. In gauges and metrics, Auto shows the value of the first summary field.

Setting	Description
`Segments`	Choose what to display as segments for your funnel chart. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Funnel Dashboard Components

Data Settings for Dashboard Scatter Chart Components

Scatter charts are useful to show one or two groups of report data plus summaries. These data settings for the scatter chart are available in the dashboard component editor under **Component Data**.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Group and set the scale to help users make sense of the data you are displaying.

Setting	Description
`Plot By`	Choose the grouping to display on your chart. To always use the first grouping or use what's in the source report's chart, pick Auto.
`X-Axis`	Choose the values to display on the horizontal axis.
`Y-Axis`	Choose what values to display on the vertical axis of your bar, column, scatter, or line chart. Depending on the chart type, axis values can be summary fields or groupings. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. If the Y-axis corresponds to a custom summary formula that has the `Where Will this Formula Be Displayed?` option set to a grouping level other than `All summary levels`, then the X-axis and Groupings selection must correspond to that custom summary formula's grouping level.
`Group By`	Choose how to group information on your chart. This option is available only if the underlying report has more than one grouping. To use the second grouping or summary field defined in the source report's chart, select `Auto`.
`Display Units`	Change the measure for values displayed on the Y-axis of the chart.

Setting	Description
`Drill Down to`	Select where users go when they click the chart. Options include the source report, the filtered source report, record detail page, or a URL you specify. Filtered report and record detail page options are unavailable when the chart has more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Scatter Charts
Modify a Dashboard Component
Formatting Settings for Dashboard Scatter Chart Components

Data Settings for Dashboard Gauge Components

A gauge is used to see how far you are from reaching a goal. It displays a single value, such as closed deals.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Setting	Description
`Values`	Choose what to display as values for your pie chart, donut chart, funnel chart, gauge, or metric. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. In gauges and metrics, Auto shows the value of the first summary field.
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Dashboard Gauge Components

Data Settings for Dashboard Line Chart Components

Line charts are useful for showing data over time.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

For example, to see the numbers of leads created each month in a report, set record count as the `Y-axis` and created month for the `X-axis`. The chart displays a line connecting the record count totals for each month.

Setting	Description
`Y-Axis`	Choose what values to display on the vertical axis of your bar, column, scatter, or line chart. Depending on the chart type, axis values can be summary fields or groupings. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. If the Y-axis corresponds to a custom summary formula that has the `Where Will this Formula Be Displayed?` option set to a grouping level other than `All summary levels`, then the X-axis and Groupings selection must correspond to that custom summary formula's grouping level.
`X-Axis`	Choose what values to display on the horizontal axis of your bar, column, scatter, or line chart. Depending on the chart type, axis values can be summary fields or groupings. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. If the X-axis corresponds to a custom summary formula that has the `Where Will this Formula Be Displayed?` option set to a grouping level other than `All summary levels`, then the Y-axis and Groupings selection must correspond to that custom summary formula's grouping level.
`Group By`	Choose how to group information on your chart. This option is available only if the underlying report has more than one grouping. To use the second grouping or summary field defined in the source report's chart, select `Auto`.
`Combination Chart`	Select this option to plot additional values on this chart. The chart type you chose must allow combination charts.
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Dashboard Line Chart Components

Data Settings for Dashboard Metric Components

The settings on the Component Data tab define how your dashboard metric component gets and manages the data it displays.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Setting	Description
`Values`	Choose what to display as values for your pie chart, donut chart, funnel chart, gauge, or metric. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. In gauges and metrics, Auto shows the value of the first summary field.
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Dashboard Metric Components

Data Settings for Dashboard Pie and Donut Chart Components

A pie chart or a donut chart is good for showing the relative shares of different quantities. Use the component data tab to select the values your pie or donut chart will compare.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Use a pie chart when you have multiple groupings and want to show the proportion of a single value for each grouping against the total.

For example, to see the breakdown of your case queue by case status in a report, set record count for `Values` and status for `Wedges`. The chart displays a circle made up of wedges, each wedge representing the cases in a case status.

Setting	Description
`Values`	Choose what to display as values for your pie chart, donut chart, funnel chart, gauge, or metric. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart. In gauges and metrics, Auto shows the value of the first summary field.
`Wedges`	Choose what to display as wedges for your pie or donut chart. To use the second grouping or summary field defined in the source report's chart, select `Auto`. When the source report has a chart, Auto picks the values used by the chart.
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.

Setting	Description
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Pie and Donut Dashboard Components

Data Settings for Dashboard Table Components

A table component shows columns of data from a custom report in a dashboard. The settings on the Component Data tab control how a table component gets and manages the data it displays.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Field	Description
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.
`Drill Down to`	Select where users go when they click a dashboard component: the full source report for the dashboard component; the source report filtered by the group, X-axis value, or legend entry they clicked; the detail page for a chart or table element, axis value, or legend entry; or a URL that you specify. (You can't use URLs that begin with "mailto:" or "javascript:".) Filtered and record detail page drill-down are disabled when viewing dashboard charts with more than 200 values.

See Also:

Data Settings for Dashboard Chart Components
Formatting Settings for Dashboard Table Components

Visual Settings for Dashboard Chart Components

Choose the type of chart that fits the data you are sharing, then apply the visual settings that will communicate the data most effectively.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

See Also:

Modify a Dashboard Component
Formatting Settings for Dashboard Bar Chart Components
Formatting Settings for Funnel Dashboard Components
Formatting Settings for Dashboard Scatter Chart Components
Formatting Settings for Dashboard Gauge Components
Formatting Settings for Dashboard Line Chart Components
Formatting Settings for Dashboard Metric Components
Formatting Settings for Pie and Donut Dashboard Components
Formatting Settings for Dashboard Table Components

Formatting Settings for Dashboard Bar Chart Components

Horizontal bar and vertical column charts are useful for comparing the values of one or more report groupings. Set the scale and sorting to help you make sense of the data you are displaying.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Setting	Description
`Sort Rows By`	Choose a sorting element to determine what element you want displayed first in the horizontal axis of any horizontal chart or the vertical axis of any vertical chart. For a table, choose the sort order for the default two-column table to be ascending or descending by row labels or values.
`Maximum Values Displayed`	Set the maximum number of elements to include in the top-level grouping of the horizontal axis of a horizontal chart, vertical axis of a vertical chart, or selected axis of a stacked bar chart. For a table, set the maximum number of rows to include. For example, if you want to list only your top five salespeople, create an opportunity report that lists total opportunity amounts by owner and enter `5` in this field.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Show Chatter Photos`	Display Chatter photos for up to 20 records in a horizontal bar chart component whose source report is grouped by a user or group name field. If there are more than 20 records with photos, record names are shown instead of photos. Set `Grouping Display` to `None` to show photos. Set the `Drill Down to` option to `Record Detail Page` to take users directly to user profile or group pages when they click photos. Chatter must be enabled for photos to be displayed. Depending on your organization's setup, you may not see photos on tables and charts.

Setting	Description
`Show Values`	Display the values of individual records or groups on the chart. This only applies to certain chart types.
`Enable Hover`	Display values, labels, and percentages when hovering over charts. Hover details depend on chart type. Percentages apply to pie, donut, and funnel charts only. Hover is disabled if your chart has more than 200 data points.

See Also:

Visual Settings for Dashboard Chart Components

Formatting Settings for Funnel Dashboard Components

Use color to show the status of a value through stages in a funnel chart.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Setting	Description
`Sort Rows By`	Choose a sorting element to determine what element you want displayed first in the horizontal axis of any horizontal chart or the vertical axis of any vertical chart. For a table, choose the sort order for the default two-column table to be ascending or descending by row labels or values.
`Maximum Values Displayed`	Set the maximum number of elements to include in the top-level grouping of the horizontal axis of a horizontal chart, vertical axis of a vertical chart, or selected axis of a stacked bar chart. For a table, set the maximum number of rows to include. For example, if you want to list only your top five salespeople, create an opportunity report that lists total opportunity amounts by owner and enter `5` in this field.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Combine Small Groups into "Others"`	Click this link to create a custom table. The `Maximum Values Displayed` field is populated with the value you entered, and the first two columns are pre-populated with the default columns. To customize a table, the source report must be summary or matrix format and contain a chart.
`Show Values`	Display the values of individual records or groups on the chart. This only applies to certain chart types.
`Show Segment %`	Display the percentage value for each segment of funnel charts.

Setting	Description
`Enable Hover`	Display values, labels, and percentages when hovering over charts. Hover details depend on chart type. Percentages apply to pie, donut, and funnel charts only. Hover is disabled if your chart has more than 200 data points.

See Also:

Visual Settings for Dashboard Chart Components

Formatting Settings for Dashboard Scatter Chart Components

Scatter charts are useful to show one or two groups of report data plus summaries. These settings for the scatter chart are available in the dashboard component editor under **Formatting**.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Tweak data displayed on the dashboard scatter chart using these settings.

Setting	Description
`Sort Rows By`	Currently sorting is unavailable.
`Maximum Values Displayed`	Set the maximum number of dots to show on the chart. When set to 5 for example, the chart shows 5 dots. These are the top 5 ascending values in the grouping used by the Plot By field of the scatter chart.
Axis Range	Keep automatic or choose manual to enter minimum and maximum values for the Y-axis range. If there are values outside the manual range, Y-axis automatically extends to include them.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Show Details on Hover`	Display values or labels when hovering over charts.

See Also:

Visual Settings for Dashboard Chart Components

Formatting Settings for Dashboard Gauge Components

Set the breakpoints and colors on your gauge component to help users interpret the current value of the field you are tracking.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Optionally, set conditional highlighting by defining up to three value ranges and colors. You need to also set the minimum and maximum for the scale. You must set highlighting to follow a component and receive alerts in your Chatter feed when the value crosses a threshold.

Setting	Description
`Minimum`	The lowest value on the chart.
`Low Range Color`	Select a color to represent the low range, up to the first breakpoint.
`Breakpoint 1`	The value that separates the middle and high range colors on the dashboard.
`Middle Range Color`	Select a color to represent the middle range, between the first and second breakpoints.
`Breakpoint 2`	Place the chart above or below your report.
`High Range Color`	Select a color to represent the high range, beyond the second breakpoint.
`Maximum`	The highest value on the chart.
`Show %`	Display the percentage value for each wedge of pie and donut charts, or for each segment of funnel charts. On a gauge, show the percentage value of the point where the needle is pointing.
`Show Total`	Display the total value for the chart. For a table, include the sum total for number and currency summary fields.

See Also:

Visual Settings for Dashboard Chart Components
Modify a Dashboard Component

Formatting Settings for Dashboard Line Chart Components

Line charts are useful for showing data over time. Use sorting and scale to help your users make sense of the data on your line chart.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Setting	Description
`Sort Rows By`	Choose a sorting element to determine what element you want displayed first in the horizontal axis of any horizontal chart or the vertical axis of any vertical chart. For a table, choose the sort order for the default two-column table to be ascending or descending by row labels or values.
`Maximum Values Displayed`	Set the maximum number of elements to include in the top-level grouping of the horizontal axis of a horizontal chart, vertical axis of a vertical chart, or selected axis of a stacked bar chart. For a table, set the maximum number of rows to include. For example, if you want to list only your top five salespeople, create an opportunity report that lists total opportunity amounts by owner and enter `5` in this field.

Setting	Description
`Y-Axis Range`	Choose a manual or automatic axis range for the vertical axis of a bar, line, or column chart. If you choose manual, enter numbers for the minimum and maximum axis values to be displayed. If there are data points outside the range that you set, the axis automatically extends to include those values when you generate the chart.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Enable Hover`	Display values, labels, and percentages when hovering over charts. Hover details depend on chart type. Percentages apply to pie, donut, and funnel charts only. Hover is disabled if your chart has more than 200 data points.

See Also:

Visual Settings for Dashboard Chart Components

Formatting Settings for Dashboard Metric Components

A metric component displays one value at a point in time. Use color to help users make sense of the data in the metric component.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Optionally, set conditional highlighting by defining up to three value ranges and colors. You must set highlighting to follow a component and receive alerts in your Chatter feed when the value crosses a threshold.

Note:

- Enter metric labels directly on components by clicking the empty text field next to the grand total.
- Metric components placed directly above and below each other in a dashboard column are displayed together as a single component.
- If you don't define breakpoint values or if you leave them blank, alerts won't be sent for the component.

Setting	Description
`Low Range Color`	Select a color to represent the low range, up to the first breakpoint.
`Breakpoint 1`	The value that separates the middle and high range colors on the dashboard.
`Middle Range Color`	Select a color to represent the middle range, between the first and second breakpoints.
`Breakpoint 2`	Place the chart above or below your report.

Setting	Description
`High Range Color`	Select a color to represent the high range, beyond the second breakpoint.

See Also:

Visual Settings for Dashboard Chart Components
Modify a Dashboard Component

Formatting Settings for Pie and Donut Dashboard Components

A pie chart is good for showing the relative shares of different quantities. Use the formatting tab to choose how to configure and label the divisions in your pie chart.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Setting	Description
`Sort Rows By`	Choose a sorting element to determine what element you want displayed first in the horizontal axis of any horizontal chart or the vertical axis of any vertical chart. For a table, choose the sort order for the default two-column table to be ascending or descending by row labels or values.
`Maximum Values Displayed`	Set the maximum number of elements to include in the top-level grouping of the horizontal axis of a horizontal chart, vertical axis of a vertical chart, or selected axis of a stacked bar chart. For a table, set the maximum number of rows to include. For example, if you want to list only your top five salespeople, create an opportunity report that lists total opportunity amounts by owner and enter `5` in this field.
`Legend Position`	Choose a place to display the legend in relation to your chart.
`Combine Small Groups into "Others"`	Click this link to create a custom table. The `Maximum Values Displayed` field is populated with the value you entered, and the first two columns are pre-populated with the default columns. To customize a table, the source report must be summary or matrix format and contain a chart.
`Show Values`	Display the values of individual records or groups on the chart. This only applies to certain chart types.
`Show %`	Display the percentage value for each wedge of pie and donut charts.
`Enable Hover`	Display values, labels, and percentages when hovering over charts. Hover details depend on chart type. Percentages apply to pie, donut, and funnel charts only. Hover is disabled if your chart has more than 200 data points.

Setting	Description
`Show Total`	Display the total value for the chart. For a table, include the sum total for number and currency summary fields.

See Also:

Visual Settings for Dashboard Chart Components

Formatting Settings for Dashboard Table Components

A table component shows columns of data from a custom report in a dashboard. You can use color and scale to help users interpret the report data the table displays.

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

You can use the default two-column table or create a custom table with up to four columns and totals.

The default two-column table uses the first grouping and summary field from the chart in the source report. If the report has no chart, default columns are based on the first grouping and summary field in the report.

Customized tables allow null values in the results. Default two-column tables do not.

To use a tabular report as the source report, `Rows to Display` must be set for that report.

Optionally, set conditional highlighting by defining up to three value ranges and colors. Highlighting only applies to the first summary field column in the table.

Setting	Description
`Sort Rows By`	Choose a sorting element to determine what element you want displayed first in the horizontal axis of any horizontal chart or the vertical axis of any vertical chart. For a table, choose the sort order for the default two-column table to be ascending or descending by row labels or values.
`Maximum Values Displayed`	Set the maximum number of elements to include in the top-level grouping of the horizontal axis of a horizontal chart, vertical axis of a vertical chart, or selected axis of a stacked bar chart. For a table, set the maximum number of rows to include. For example, if you want to list only your top five salespeople, create an opportunity report that lists total opportunity amounts by owner and enter `5` in this field.
`Show Chatter Photos`	Display Chatter photos for up to 20 records in a horizontal bar chart component whose source report is grouped by a user or group name field. If there are more than 20 records with photos, record names are shown instead of photos. Set `Grouping Display` to `None` to show photos. Set the `Drill Down to` option to `Record Detail Page` to take users directly to user profile or group pages when they click photos. Chatter must be enabled for photos to be displayed. Depending on your organization's setup, you may not see photos on tables and charts.
`Customize Table`	Click this link to create a custom table. The `Maximum Values Displayed` field is populated with the value you entered, and the first two columns are pre-populated with the default columns. To customize a table, the source report must be summary or matrix format and contain a chart.

Setting	Description
`Table Columns`	Specify up to four columns to display in the table. Available columns can be any grouping or summary field used in the chart. Update the report's chart or groupings to make more columns available for the dashboard table.
`Sort Ascending`	Sort the custom table in A-to-Z or smallest-to-largest order in a column. You can't sort on second-level groupings.
`Sort Descending`	Sort the custom table in Z-to-A or largest-to-smallest order in a column. You can't sort on second-level groupings.
`Show Total`	Display the total value for the chart. For a table, include the sum total for number and currency summary fields.
`Reset Table to Defaults`	Go back to the default two-column table.
`Low Range Color`	Select a color to represent the low range, up to the first breakpoint.
`Breakpoint 1`	The value that separates the low and middle range colors on the dashboard.
`Middle Range Color`	Select a color to represent the middle range, between the first and second breakpoints.
`Breakpoint 2`	`Breakpoint 2`
`High Range Color`	Select a color to represent the high range, beyond the second breakpoint.

See Also:

Visual Settings for Dashboard Chart Components
Modify a Dashboard Component

Provide Individualized Views of a Dashboard

Dynamic dashboards enable each user to see the data they have access to. With a dynamic dashboard, you can control data visibility without having to create a separate dashboard, with its own running user and folder, for each level of data access.

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards.

Folders control access to the dashboard, but the *running user* determines access to data. The running user options are:

- **Run as specified user.** The dashboard runs using the security settings of that single, specific user. All users with access to the dashboard see the same data, regardless of their own personal security settings. This approach is perfect for sharing the big picture across a hierarchy, or motivating team members by showing peer performance within a team. If you don't have "View All Data," you can only choose yourself. If you have "View My Team's Dashboards," you can choose any user below you in the role hierarchy.

- **Run as logged-in user.** A *dynamic dashboard* runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level. This approach helps administrators share one common set of dashboard components to users with different levels of access.

With a dynamic dashboard, you can control data visibility without having to create a separate dashboard, with its own running user and folder, for each level of data access. A single dynamic dashboard can display a standard set of metrics across all levels of your organization.

You can create up to three filters for each dynamic dashboard. Filtering dynamic dashboards gives administrators additional flexibility in creating dashboards. For example, you can create an organization-wide sales scorecard that contains sales rep and product filters. This allows individual sales managers to view their reps' performance collectively as well as individually. It also lets them view sales by product to understand which products specific reps are or aren't selling.

Managers with the "View My Team's Dashboards" or "View All Data" permission can set an option to preview the dashboard from the point of view of users under them in the role hierarchy.

Your organization can have up to five dynamic dashboards for Enterprise Edition, 10 for Unlimited Edition, and three for Developer Edition.Additional dynamic dashboards may be available for purchase.

Note:

- Following components isn't supported for dynamic dashboards.
- You can't save dynamic dashboards to personal folders.
- You can't schedule refreshes for dynamic dashboards. They must be refreshed manually.

Example Business Scenario

Let's say that your opportunity team consists of one vice president, four sales managers, and 40 sales reps—10 reps per manager. You've been asked to create dashboards that display the following metrics, restricted by role and hierarchy:

Role	Total Bookings	Close Rates by Competitor	Number of Activities by Meeting Type
Sales Rep	✓		✓
Sales Manager	✓	✓	
VP of Sales	✓	✓	

Sales reps should only see their own data; managers should only see data for the reps they manage; and the VP should see data across the entire team. In this scenario, you'd typically have to create *45* different dashboards—one for every single person. You'd also have to create multiple folders to manage access rights.

With dynamic dashboards, you can create just *two* dashboards and store them in a single folder:

- Create a dynamic dashboard for sales reps with the following components:
  - ◊ A gauge of total bookings
  - ◊ A table of activities by meeting type
- Create a dynamic dashboard for managers and the VP with the following components:
  - ◊ A gauge of total bookings
  - ◊ A column chart of close rates by competitor

- Optionally, create filters that let viewers further refine their dashboard views. For example, create a filter on key accounts to let viewers focus on bookings, activities, and competitive threats for each account.

All users only see data that they can access. Sales reps see their own bookings and activities. Managers see bookings and close rates for the reps they manage. The VP sees bookings and close rates for the whole team. Because the metrics are the same for managers and the VP, you can use the same dynamic dashboard for both roles. The dynamic dashboards feature reduces the number of required dashboards from 45 to two!

See Also:

Share Insights with Dashboards
Set Up Dynamic Dashboards
Filter Dashboard Data
Create a Dashboard
Set Up Dynamic Dashboards

Set Up Dynamic Dashboards

To set up a dynamic dashboard, create a folder to hold the dashboard and its underlying reports, then create the dashboard.

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create, edit, and delete dynamic dashboards:	"Run Reports" AND "Manage Dynamic Dashboards"
To enable choosing a different running user for the dashboard:	"View My Team's Dashboards" OR "View All Data"

Your organization can have up to five dynamic dashboards for Enterprise Edition, 10 for Unlimited Edition, and three for Developer Edition.

Note:

- You can't save dynamic dashboards to personal folders.
- You can't schedule refreshes for dynamic dashboards. They must be refreshed manually.

1. Create folders accessible to all dashboard viewers to store dynamic dashboards and corresponding component source reports.
2. From the Dashboards tab, create a new dashboard or edit an existing one.
3. Click the button next to the `View dashboard as` field.

   Note: If you don't have "Manage Dynamic Dashboards" permission, just enter a running user and skip to the final step. Enter "*" to see all available users.

4. Select `Run as logged-in user`.
5. Optionally, select `Let authorized users change running user` to enable those with permission to change the running user on the dashboard view page.
   - Users with "View My Team's Dashboards" can view the dashboard as any user below them in the role hierarchy.

- Users with "View All Data" can view the dashboard as any user in their organization.

6. Click **OK**.
7. In the `View dashboard as` field, enter a running user.
8. Save your dashboard.
9. Set the appropriate `Show` option on the report run page.
   For example, if you choose "My Team's Opportunities," each dynamic dashboard viewer can see all opportunities for the team.

Tip: To avoid restricting the dashboard's view of the data:

- Make sure advanced filters don't include specific record owners (for example, `Opportunity Owner equals Frank Smith`).
- Don't click `Save Hierarchy Level` when saving opportunity reports.

See Also:

Provide Individualized Views of a Dashboard
Add a Dashboard Filter
Provide Individualized Views of a Dashboard
Choose a Dashboard Running User

Let Users View Dashboards on the iPad

The Mobile Dashboards for iPad app is automatically enabled for your organization so your users can access the app without any configuration on your part.

Available in: **Enterprise**, **Unlimited,** and **Developer** Editions

User Permissions Needed	
To view Mobile Dashboards for iPad settings:	"View Setup and Configuration"
To modify Mobile Dashboards for iPad settings:	"Customize Application"

You can disable the app if you don't want users accessing Salesforce data from mobile devices and you can easily re-enable it if you change your mind later.

To configure access to Mobile Dashboards for iPad:

1. From Setup, click **Mobile Administration** > **Mobile Dashboards** > **Settings**.
2. Select or deselect `Enable the Mobile Dashboards iPad app for all users.`
3. Click **Save**.

Users can download and install the Mobile Dashboards for iPad app from the Apple App Store or AppExchange Mobile.

Aside from editions noted, the app is available to organizations enabled with REST API.

See Also:

Share Insights with Dashboards

Edit Dashboards in Accessibility Mode

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To view and refresh dashboards:	“Run Reports” AND access to dashboard folder
To create dashboards:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you created:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you didn’t create:	“Run Reports,” “Manage Dashboards,” AND “View All Data”
To create, edit, and delete dynamic dashboards:	“Run Reports” AND “Manage Dynamic Dashboards”

Important: This topic applies only if you're *not* using the dashboard builder. *Dashboard builder* is a drag-and-drop interface for creating and modifying dashboards.

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. To customize a dashboard, view it and click **Edit**.

From the Dashboard Edit page, you can:

- See the running user for the dashboard in the `Displaying data as` field.
- Click **Dashboard Properties** to change the title, folder, running user, and more.
- Click **Done** to view the dashboard. All changes you make to the dashboard are saved as you make them.
- Click the **Delete** button to delete the entire dashboard.
- Click **Add Component** in any column.
- Click **Narrow**, **Medium**, or **Wide** to set a column's width.

  Note: If your component is a pie or donut chart with `Show Values` or `Show Percentages` enabled and `Legend Position` set to Right, the dashboard column width must be `Wide` for values and percentages to show on the dashboard.

- Click , , , and to rearrange components in the dashboard.
- Click **Edit** to modify component properties like the component type, display units, source report, and more.
- Click **Delete** to remove a component from the dashboard. Deleted components don't get stored in the Recycle Bin.

- Click a dashboard component or its elements to drill down to the source report, filtered report, record detail page, or other URL. If you drill down on a filtered component, the dashboard filters are applied to the source report.

See Also:

Share Insights with Dashboards
Set Dashboard Properties in Accessibility Mode
Adding and Editing Dashboard Components in Accessibility Mode
Dashboard Component Properties in Accessibility Mode
Adding and Editing Dashboard Components in Accessibility Mode
Create a Dashboard
Set Dashboard Properties in Accessibility Mode

Set Dashboard Properties in Accessibility Mode

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create dashboards:	"Run Reports" AND "Manage Dashboards"
To create, edit, and delete dynamic dashboards:	"Run Reports" AND "Manage Dynamic Dashboards"
To enable choosing a different running user for the dashboard:	"View My Team's Dashboards" OR "View All Data"

Important: This topic applies only if you're *not* using the dashboard builder. *Dashboard builder* is a drag-and-drop interface for creating and modifying dashboards.

To set dashboard properties:

1. Edit a dashboard and click **Dashboard Properties**.
2. Do the following:
    - Enter a title and description for the dashboard.
    - If you have the "Customize Application" permission, enter a unique name to be used by the API and managed packages.
    - Select the number of columns for this dashboard. Each dashboard can have two or three columns.

      Important: Before removing a column, move its components to another column; otherwise, they may not be visible.

    - Select a folder to store the dashboard. The folder should be accessible by all of your intended viewers.
    - Choose the `Dashboard Running User` to set visibility settings for the dashboard:
        - ◊ Select `Run as specified user` and set the `Running User` field to show all dashboard users the same data, regardless of their personal security settings. If you don't have "View All Data," you can only choose yourself.
        - ◊ Select `Run as logged-in user` to show data to each user according to his or her access level.

- Set the `View Edit Page as` field to preview the dashboard edit page from the point of view of the selected user.
- If you have the "View My Team's Dashboards" or "View All Data" permission, select `Let authorized users change running user` to enable those with permission to change the running user on the dashboard edit page. Users with "View My Team's Dashboards" can view the dashboard as any user below them in the role hierarchy. Users with "View All Data" can view the dashboard as any user in their organization.

- Under Component Settings, select the title color and size, text color, and background fade. If you don't want a gradient, choose the same color for both `Starting Color` and `Ending Color`.

3. Click **Save**.

See Also:

Edit Dashboards in Accessibility Mode
Set Up Dynamic Dashboards
Choose a Dashboard Running User

Adding and Editing Dashboard Components in Accessibility Mode

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To create dashboards:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you created:	"Run Reports" AND "Manage Dashboards"
To edit and delete dashboards you didn't create:	"Run Reports," "Manage Dashboards," AND "View All Data"

Important: This topic applies only if you're *not* using the dashboard builder. *Dashboard builder* is a drag-and-drop interface for creating and modifying dashboards.

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

To add a dashboard component:

1. Edit a dashboard.
2. Click **Add Component** from the top of any column and define component properties.
3. Choose the `Custom Report` to use for your dashboard. If you chose the `Visualforce Page`, or `Custom S-Control` component, select a page or s-control and enter the display height. You can show a joined report that includes a chart on a dashboard. Edit the joined report dashboard component and select **Use chart as defined in the source report**.

Note:

- Custom forecast and lead reports that you created using a standard report may not be available in the `Custom Report` list.
- To use a tabular report on a dashboard, first limit the row count, by setting the `Rows to Display` option, the sort column, and the order on the Select Criteria page of the report. You can't use gauge or metric components on dashboards using tabular reports.

4. Enter the appropriate settings for the component type you selected:Choose settings on the Formatting tab for the component type you selected:
   - Formatting Settings for Dashboard Bar Chart Components
   - Formatting Settings for Dashboard Scatter Chart Components
   - Formatting Settings for Dashboard Gauge Components
   - Formatting Settings for Dashboard Metric Components
   - Formatting Settings for Dashboard Table Components
5. Click **Save**.

Note: Metric components placed directly above and below each other in a dashboard column are displayed together as a single component.

See Also:

Edit Dashboards in Accessibility Mode
Chart Types
Modify a Dashboard Component

Dashboard Component Properties in Accessibility Mode

Important: This topic applies only if you're *not* using the dashboard builder. *Dashboard builder* is a drag-and-drop interface for creating and modifying dashboards.

The following settings may vary according to the component type you select.

Field	Description
`Component Type`	Select vertical or horizontal bar chart, line chart, pie or donut chart, table, metric, gauge, Visualforce page, or custom s-control.
`Header`	Enter text to display at the top of the dashboard component.
`Footer`	Enter text to display at the bottom of the dashboard component.
`Title`	Enter a title to identify the dashboard component.
`Display Units`	Choose a scale for displaying your chart values. For table components, this setting applies only to the first column. For best results, choose Auto to let Salesforce select appropriate units.

Field	Description
`Drill Down to`	Select what happens when users click a dashboard component: • Source Report—Takes the user to the full source report for the dashboard component. • Filtered Source Report—When users click individual groups, X-axis values, or legend entries, they are taken to the source report filtered by what they clicked. For example, if you had a stacked vertical column chart of opportunities grouped by stage, with months as the X-axis, you could click an individual stage in a bar, a month on the X-axis, or a legend entry for a stage to drill down to the filtered source report. (Not available for gauges, metrics, or tables.) • Record Detail Page—When users click chart or table elements, axis values, or legend entries, they are taken to the detail page for that record. You can only choose this option for tables and charts that use a source report grouped by record name, record owner, or feed post. (Not available for gauges or metrics.) • Other URL—Takes the user to the URL that you specify. You can't add URLs that begin with "mailto:" or "javascript:" to dashboard components. **Note:** Filtered and record detail page drill-down are disabled for dashboard charts with more than 200 values.
`Drill Down URL`	Specify the URL that users go to when they click the dashboard component. Use this option to send users to another dashboard, report, record detail page, or other system that uses a Web interface.

See Also:

Edit Dashboards in Accessibility Mode
Modify a Dashboard Component
Dashboard Component Types

Why doesn't my dashboard display the data I expect?

If you're not seeing data you expect, refresh for latest data, check that you have the right running user, and verify whether data sources on the dashboard are correct.

If your dashboard data doesn't look as you expect, check the following:

- **Running user.** Remember that you're viewing the dashboard from the perspective of the running user. What you see is based on that user's access rights. For dynamic dashboards, you can only see what you yourself can access.
- **Last dashboard refresh.** You may be viewing older data. Click **Refresh** to refresh your dashboard.

- **Data sources.** Verify that your data sources (reports, s-controls, or Visualforce pages) contain the information you want displayed in the dashboard components.

See Also:

Share Insights with Dashboards

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