Reports in Salesforce

A **Report** in Salesforce is a list of records that meet certain criteria, displayed in a table format. Reports can be customized using filters, groupings, and formulas.

Report Types in Salesforce

1. Standard Report Types

These are the default report types provided by Salesforce, automatically available when an object is created. They include the primary object and its related records based on standard relationships.

- Example: **"Accounts with Contacts"** (Shows all accounts that have related contacts).

2. Custom Report Types

When standard report types don't meet business needs, **Custom Report Types (CRT)** allow users to define:
✅ **Which objects to include** (up to 4 related objects).
✅ **Which fields to display** (even from related objects).
✅ **How objects are related** (e.g., Accounts **with** or **without** Opportunities).

Example: A **Custom Report Type** can be created to show **"Opportunities with or without Activities"**, whereas a standard report might only show Opportunities with Activities.

When to Use Custom Report Types?

✅ When you need data from **more than one related object** (e.g., "Accounts with or without Opportunities").
✅ When you want to **include fields that standard reports don't show**.
✅ When you need **custom relationships** (e.g., Opportunities that don't have Contacts).

Types of Reports

Salesforce provides four types of reports:

- **Tabular Reports** – Basic table format with no grouping. Example: A list of all leads.
- **Summary Reports** – Grouped by a field with subtotals. Example: Total sales grouped by salesperson.
- **Matrix Reports** – Data grouped both horizontally and vertically. Example: Sales grouped by **Region (Rows)** and **Product (Columns)**.
- **Joined Reports** – Combine multiple reports in a single view to compare data across different objects.

1. Tabular Reports (Simple List)

What is it?

- The most basic report type, displaying data in a simple row-wise format (like an Excel sheet).
- No grouping, no summarization.

Use Case

- List of all Leads assigned to a specific Sales Rep.
- Exporting data for external analysis.

Limitation

- Cannot be used in Dashboards (unless you add a Row Limit).

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2. Summary Reports (Grouped Data)

What is it?

- Data is **grouped** based on a field (e.g., grouped by "Industry" or "Owner").
- Can include **sum, average, max, min calculations**.

Use Case

- Total **Revenue grouped by Sales Rep**.
- **Number of Opportunities per Account**.

Key Features
✅ Can be used in **Dashboards**.
✅ Allows **conditional highlighting** (e.g., highlight high-value deals in green).

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3. Matrix Reports (Pivot Table Format)

What is it?

- Similar to a **pivot table in Excel**.
- Data is grouped by **rows AND columns**.

Use Case

- Revenue grouped by **Region (Rows)** and **Product (Columns)**.
- **Sales pipeline categorized by Stage & Sales Rep**.

Key Features
✅ Can be used in **Dashboards**.
✅ Ideal for **complex data analysis**.

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4. Joined Reports (Multiple Related Reports)

What is it?

- Allows combining **multiple reports from different report types**.
- Each block has its own filters and fields.

Use Case

- Compare **"Open Opportunities" vs. "Closed Opportunities"** side by side.
- View **Cases and Related Accounts** in the same report.

Key Features
✅ Shows **multiple datasets in one report**.
✅ Each dataset can have **separate filters**.

Report Type	Description	Grouping	Best Use Case
Tabular	Simple list of data	❌ No	Exporting records
Summary	Grouped records	✅ Yes (1 grouping)	Sales revenue per region
Matrix	Grouped by rows & columns	✅ Yes (Multiple)	Product sales by Region & Quarter
Joined	Combines multiple related reports	✅ Yes (Multiple)	Comparing Open & Closed Opportunities

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Filters in Reports

Filters allow users to refine the data displayed in reports.

- **Standard Filters** – Filter by date, record owner, status, etc.
- **Field Filters** – Filter by specific field values, such as "Industry = Healthcare".
- **Cross Filters** – Filter records based on related objects. Example: Show only accounts that **have** or **do not have** opportunities.
- **Filter Logic** – Combine multiple filters using **AND/OR conditions**.

Grouping & Summarization

Reports allow grouping and calculations:

- **Group by a field** (e.g., Opportunities grouped by Account).
- **Summarize numeric fields** (e.g., total revenue, average deal size).
- **Bucket Fields** – Categorize records without using formula fields. Example: Bucketing age groups into "Young", "Middle-aged", "Senior".

Formulas in Reports

- **Row-Level Formulas** – Perform calculations at the record level. Example: `Revenue - Cost = Profit`.
- **Summary Formulas** – Perform aggregate calculations on grouped data. Example: `SUM of Closed Deals`.

Report Customization

- **Custom Report Types** – Allows pulling data from multiple related objects beyond standard relationships.
- **Conditional Highlighting** – Highlights fields based on conditions (e.g., highlight revenue over $100,000 in green).
- **Export Options** – Reports can be exported in CSV or Excel format.

Report Scheduling & Subscriptions

- **Scheduled Reports** – Reports can be automatically emailed to users at specific intervals.
- **Report Subscriptions** – Users can subscribe to reports and get notified when criteria are met (e.g., send an alert when new leads exceed 100).

Report Sharing & Security

- **Folder-Based Access** – Reports are stored in folders with permissions.
- **Sharing Settings** – Reports can be shared with specific users, roles, or public groups.

Dashboards in Salesforce

A **Dashboard** is a visual representation of one or more reports, helping users analyze key metrics quickly.

2.1 Features of Dashboards

1. Dashboard Components

Dashboards consist of different components, each displaying data visually:

- **Charts** – Bar, Line, Pie, Donut, and Funnel charts.

- **Gauges** – Display a progress indicator. Example: % of quota achieved.
- **Tables** – Display report data in a tabular format.
- **Metrics** – Show a single key value, such as "Total Revenue".
- **Visualforce Pages** – Custom UI components embedded in the dashboard.

2. Dashboard Filters

- Filters allow users to change the dashboard view dynamically.
- Example: A sales dashboard with filters for different **Regions** or **Time Periods**.

3. Dynamic Dashboards

- Show different data depending on the logged-in user.
- No need to create separate dashboards for each user.
- Example: A **Sales Rep** sees only their own opportunities, while a **Manager** sees all opportunities.

4. Scheduled Refresh & Auto-Refresh

- Dashboards can be set to refresh **daily, weekly, or monthly**.
- Users can **manually refresh** dashboards to see real-time data.

5. Dashboard Sharing & Security

- **Folder-Based Access** – Similar to reports, dashboards are stored in folders with permissions.
- **Public & Private Dashboards** – Control who can view or edit a dashboard.

6. Dashboard Subscription

- Users can subscribe to dashboards and receive email snapshots.
- Example: A sales VP receives a weekly dashboard summary via email.

Difference Between Reports and Dashboards

Feature	Reports	Dashboards
Purpose	Data analysis & detailed insights	Visual representation of data
Data Source	Objects & fields	Based on reports
Format	Tables, summaries, and lists	Charts, metrics, tables, and gauges
Interactivity	Drill-down to records	Click charts to view reports
Customization	Grouping, formulas, filters	Chart types, filters, components
Scheduling	Auto-email subscriptions	Scheduled refresh, email snapshots

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Best Practices for Reports & Dashboards

✅ For Reports

- Use **Summary & Matrix Reports** for better insights.
- Leverage **Cross Filters** to refine data.
- Apply **Conditional Formatting** to highlight key metrics.
- Use **Scheduled Reports** for automated updates.

✅ For Dashboards

- Use **Dynamic Dashboards** for user-based data.
- Keep dashboards simple with **3–5 key metrics**.
- Use **filters** to make dashboards flexible.
- Set **scheduled refresh** for real-time data.

1. What are Salesforce Reports?

Salesforce Reports are **structured representations of data** stored in Salesforce. They allow users to filter, group, and summarize data for business analysis. Reports are stored in folders, which can be shared with users, roles, or groups.

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2. What are the different Report Types in Salesforce?

1. **Tabular Report** – Simple list format (like an Excel sheet).
2. **Summary Report** – Grouped data with subtotals.
3. **Matrix Report** – Data grouped by rows and columns.
4. **Joined Report** – Combines multiple reports for comparison.

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3. What is a Custom Report Type?

A Custom Report Type (CRT) **allows users to create reports with** specific objects, fields, and relationships **that aren't available in standard reports. It lets you choose** up to 4 related objects **and define whether records must have related data.**

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4. What is the difference between a Standard and a Custom Report Type?

Feature	Standard Report Type	Custom Report Type
Objects	Default objects & relationships	Select up to 4 related objects
Fields	Default fields available	Can include custom & related object fields
Control	Limited customization	Full control over relationships & fields

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5. How do Summary and Matrix Reports differ?

Feature	Summary Report	Matrix Report
Grouping	Groups records by one field	Groups records by rows & columns
Visualization	More detailed than tabular	Works like a pivot table
Use Case	Sales grouped by Region	Sales grouped by Region & Product

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6. What are Row-Level Formulas in Reports?

A **Row-Level Formula** is a **custom calculation** applied at the individual record level within a report. Example:
Formula: `Revenue - Cost = Profit`

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7. What is a Summary Formula? How is it different from a Row-Level Formula?

- **Row-Level Formula** – Applies to each record (e.g., Profit per deal).
- **Summary Formula** – Applies to a **grouped level** (e.g., Total Revenue per Sales Rep).

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8. What are Cross Filters in Reports?

Cross Filters allow filtering records based on **related objects**.
Example:

- Accounts **WITH** Opportunities
- Accounts **WITHOUT** Opportunities

9. What are Bucket Fields in Reports?

Bucket Fields categorize values without creating a formula field.
Example:
If Age is stored as numbers, you can create **buckets**:

- **Young** (0-25)
- **Middle-Aged** (26-50)
- **Senior** (51+)

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10. How can you share a Report in Salesforce?

- Place it in a **Shared Folder** (Users need access to the folder).
- Use **Report Subscription** to email the report to users.
- **Public Groups & Roles** for specific access control.

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11. What is a Salesforce Dashboard?

A **Dashboard** is a **visual representation** of one or more reports. It helps users analyze key business metrics using **charts, tables, and gauges**.

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12. What are the different Dashboard Components?

1. **Charts** – Bar, Pie, Line, Donut, Funnel.
2. **Gauges** – Show progress against a target.
3. **Metrics** – Display a **single key value**.
4. **Tables** – Show a tabular representation of a report.

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13. What is a Dynamic Dashboard?

A **Dynamic Dashboard** shows data based on the logged-in user. Instead of creating multiple dashboards for different users, a single dynamic dashboard can be used.

Use Case:
A **Sales Manager** sees **all** sales, while a **Sales Rep** sees **only their own** sales.

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14. Can we schedule a Dashboard Refresh?

Yes, Dashboards can be **auto-refreshed daily, weekly, or monthly**. However, Dynamic Dashboards **cannot be scheduled**.

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15. What are Dashboard Filters?

Dashboard Filters allow users to **change dashboard views dynamically**.
Example: A Sales Dashboard can have a filter for "Region" to switch between "North America" and "Europe."

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16. How can you improve Report Performance in Salesforce?

- Use Filters **– Reduce data by filtering unnecessary records.**
- Limit Report Data **– Avoid selecting too many columns.**
- Use Summary Fields **– Instead of calculating in external tools.**
- Avoid Large Joins **– Reports on too many related objects slow performance.**

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17. How do you control access to Reports & Dashboards?

- **Folder Permissions** – Control access based on profiles, roles, and public groups.
- **Sharing Settings** – Restrict or allow users to view/edit reports.
- **Field-Level Security** – Even if a user has access to a report, restricted fields remain hidden.

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18. You need to create a report showing only Opportunities that do NOT have Activities. How do you achieve this?

Use a **Cross Filter**:

- Primary Object: **Opportunities**

- Related Object: **Activities**
- Filter: **WITHOUT Activities**

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19. How do you create a report that compares "Closed Won" vs. "Closed Lost" Opportunities?

Use a **Joined Report**:

- First block: **Closed Won Opportunities**
- Second block: **Closed Lost Opportunities**

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20. A Sales VP wants to receive a report every Monday at 8 AM. How do you automate this?

Use **Report Subscriptions** to schedule the report delivery via email.

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21. How do you track the number of new Accounts created each month?

- Use a **Summary Report** grouped by "Created Date" (Month).
- Add a **Summary Formula**: `COUNT(Account ID)`.

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22. How can you ensure different sales teams only see their own reports?

- Use **Role-Based Report Sharing**.
- Store reports in separate folders with restricted access.
- Use **Dynamic Dashboards**.

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23. Can you create a report on Deleted Records?

No, but you can use the **Recycle Bin** or enable **Field History Tracking**.

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24. Can Reports display Fields from Related Objects?

Yes, if using a **Custom Report Type**.

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25. What happens when a Dashboard has a Report with Row Limits?

Only **the top records within the row limit** will be displayed.

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26. What is the Maximum Number of Dashboard Components?

Up to **20 components per Dashboard**.

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27. Can a Dashboard be exported?

No, but reports inside dashboards can be exported.