**What is a report?**

In its simplest form, a report is a list of records (like opportunities or accounts) that meet the criteria you define. But reports are much more than simple lists. To get the data you need, you can filter, group, and do math on records. You can even display them graphically in a chart!

Every report is stored in a folder. Report folders determine how reports are accessed, and who can access them to view, edit, or manage. Folders can be public, hidden, or shared. You control who has access to the contents of the folder based on roles, permissions, public groups, territories, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

## What is a dashboard?

A dashboard is a visual display of key metrics and trends for records in your org. The relationship between a dashboard component and report is 1:1; for each dashboard component, there is a single source report. However, you can use the same report in multiple dashboard components on a single dashboard (for example, use the same report in both a bar chart and pie chart). You can display multiple dashboard components on a single dashboard page, creating a powerful visual display and a way to consume multiple reports that often have a common theme, like sales performance or customer support.

Like reports, dashboards are stored in folders, which control who has access. If you have access to a folder, you can view its dashboards. However, to view the dashboard components, you need access to the underlying reports as well.

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 this reason, you’ll want to choose the running user wisely, so as not to open up too much visibility. For example, set the sales manager as the running user for a leaderboard for her team. This allows her team members to view the leaderboard for their individual team, but not other teams.

Dynamic dashboards are dashboards for which the running user is always the logged-in user. This way, each user sees the dashboard according to his or her own access level. If you’re concerned about too much access, dynamic dashboards might be the way to go.

## What is a report type?

A report type is like a template that makes reporting easier. The report type determines which fields and records are available for use when creating a report. This is based on the relationships between a primary object and its related objects. For example, with the ‘Contacts & Accounts’ report type, ‘Contacts’ is the primary object and ‘Accounts’ is the related object.

Reports display only records that meet the criteria defined in the report type. Out of the box, Salesforce provides a set of predefined standard report types. Don’t see all the fields you want? You might need to create a custom report type.

## Select a Report Type

Each report type has a primary object relationship and a field layout.

The object relationship determines which records the report type includes. Objects are standard or custom Salesforce entities, like opportunities, accounts, and products. Each object relationship specifies a primary object, like opportunities, and optionally one or more related objects. If you specify only a primary object, your report type includes only records for that object. If you also specify a related object, like products, then your report type includes primary objects with (or without, depending on configuration) related objects. For example, the report type Opportunities with Products includes opportunity records that have at least one related product record. If you add a related object, here’s how you can configure a report type’s object relationship:

* **Primary object with related object**—Records returned are only those where the primary object has at least one related object record. In our example of Opportunities with Products, the only records that would be displayed on the report would be opportunities that have at least one related product record.
* **Primary object with or without related object**—Records returned are those where the primary object may or may not have a related object record. If we were to create a custom report type, Opportunities with or without Products, then opportunities would be displayed whether or not they have a related product record.

The field layout determines which fields the report type includes. Fields often translate to “columns” in a report. A single instance of an object (a record) is described by a set of fields, and each field also has a type. Field types include Text, Number, Checkbox, and Date/Time. For example, each opportunity record has fields (with field type in parentheses) like Account Name (Text), Amount (Number), Closed (Checkbox), and Close Date (Date/Time).

## Use Filters

You can filter the data in a report using the following filter options.

| **Filter Type** | **Description** |
| --- | --- |
| **Standard Filter** | Standard filters are applied by default to most objects. Different objects have different standard filters, but most objects include the standard filters Show Me and Date Field . Show Me filters the object around common groupings (like “My accounts” or “All accounts”). Date Field filters by a field (such as Created Date or Last Activity ) and a date range (such as “All Time” or “Last Month”). |
| **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. |
| **Filter Logic** | Add Boolean conditions to control how field filters are evaluated. You must add at least 1 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. |

**Use Cross-Object Filters**

Now that you’ve built a filter, let’s go to the next level with cross-object filters, or “cross filters.” These filter types allow you to extend your reports to objects related to the original objects defined in the report type. Cross filters help you fine-tune your results, without writing code or using formulas. The most common use case is exception reporting. Here are some examples that the Sales team at Ursa Major Solar has requested.

* **Accounts with Opportunities**- Accounts with opportunities that are stuck in the early stages of the sales cycle. Lance would like to spend the afternoon doing outreach to these accounts to see if he can move them along to the next stages.
* **Stale Opportunities** - Opportunities without activities in the past 90 days. Erin doesn’t want to waste time calling these opportunities.
* **Orphan Contacts** - Contacts without accounts. Lincoln wants to add these contacts to accounts or scrub them away.

## Use Report Formats

There are three report formats available: Tabular, Summary, and Matrix. Tabular is the default format.

| **Report Format** | **Primary Use Case** | **Supported in Dashboards** | **Report Charts Supported** | **Bucket Fields\*\*** | **Formulas\*\*** | **Cross-Object Formulas\*\*** |
| --- | --- | --- | --- | --- | --- | --- |
| Tabular | Make a list | Check icon indicating true\* |  | Check icon indicating true |  |  |
| Summary | Group and summarize | Check icon indicating true | Check icon indicating true | Check icon indicating true | Check icon indicating true |  |
| Matrix | Group and summarize, by row and column | Check icon indicating true | Check icon indicating true | Check icon indicating true | Check icon indicating true |  |

## Tabular Reports

Tabular reports are the simplest and fastest way to look at your data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. They're often best used for tasks like generating a mailing list.

## Summary Reports

Summary reports are similar to tabular reports, but also allow you to group rows of data, view subtotals, and create charts. Summary reports give us many more options for organizing the data, and are great for use in dashboards. Yes!

Summary reports are the workhorses of reporting—most people find that most of their reports tend to be of this format.

## Matrix Reports

Matrix reports allow you to group records both by row and by column. These reports are the most time-consuming to set up, but they also provide the most detailed view of our data.

So why would you want to use a matrix report? If you’re looking for an at-a-glance overview of data, especially for something like totals of revenue or quantity of products sold, then the matrix report format is for you.