**Reports & Dashboards**

**Reports**

**Report Types**  
 - Report Types are the templates which gives you the ability to create the Reports in a different format.

- 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

- A report is a list of records that meet the criteria define by you.

- It’s displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart.

- With the help of report you can show the key information about the objects. For Example, Top Accounts, Top Products, Successful Marketing campaign

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 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 |  |

Joined Report   
Joined reports can use a mix of standard and custom report types.

You can add report types to a joined report if they have relationships with the same objects. For example, Opportunities and Cases both have fields in common with Accounts, so you can create a joined report with them.  
   
  
**Filters**

| Filter Type | Description |
| --- | --- |
| **Standard Filter** | Most objects include standard filters. Different objects have different standard filters, but most include the standard filters Show Me and Created Date. 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. To add a field filter, use the search bar in the Filters tab or drag the field from the Fields list. |
| **Filter Logic** | Add Boolean conditions to control how field filters are evaluated. You must add at least 1 field filter before applying filter logic. Filter logic applies to field filters, but not standard filters. |
| **Cross Filter** | Filter a report by a 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 include only those opportunities. |
| **Row Limit** | For ungrouped (tabular) reports, select the maximum number of rows to display, choose a field to sort by, and specify 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. |

**Formulas** row formulas   
 summari formula

**Bucket**  
 - группировка по значениям

**Subscribe and schedule run** Report notification (only in Classic) **Run by link (button) with URL parameters** (All Opps link on Account)

**Tips (improve performance)**  
 Remove unnecessary columns  
 Set the scope for relevant data  
 Use efficient filters with operators  
 Schedule reports or dashboards

**Dashboards**

A dashboard is a visual display of key metrics and trends for records in your org. The Dashboards is collection of Reports, VF pages and other components.  
  
widgets  
Folders  
Run as  
Subscribe  
Filter

(in classic VisualForce pages)