**REPORTS & DASHBOARDS**

Salesforce provides a feature called as "Analytics", which includes "Reports and Dashboards" used to configure the reports inside the Application.

Report contains a set of records collected from one/more Salesforce Objects.

We can represent the report data in the pictorial format by using dashboard.

Each report contains a set of configuration parameters as below.

1. "Report Type".

2. "Columns / Fields" to be visible in the report.

3. "Order of the Fields", to be visible in the report.

4. Set of Filter Conditions, to filter the records in the report.

5. Chart Component.

6. Scheduling information to run the report based on the periodical intervals.

Report data will be always "Real-Time Data". Report data will be always "User Context Data".

Salesforce provides 2 types of Reports.

1. Standard Reports: These are the readymade reports given by Salesforce by default as part of the Salesforce CRM.

2. Custom Reports: The Administrator/Developer can Create their own reports based on the application requirement.

Each Report should reside inside a "Report Folder". Salesforce provides 2 types of Report Folders.

1. Standard Report Folders: These are the readymade folders provided by Salesforce, which contains the "Standard Reports" inside it.

Ex: Unfiled Public Reports Folder.

Sales Reports Folder

Account Reports Folder

Opportunity Reports Folder

Lead Reports Folder

2. Custom Report Folders: We can create our own custom report folders, to store the custom reports configured by the Administrator.

Ex: Banking Reports Folder

Loans Reports Folder

Daily Reports Folder

Reports in Salesforce can be configured using

1. Report Builder: It is a tool used to configure the reports based on the requirement.

2. Report Scheduler: It is used to schedule the reports to run based on the periodic time intervals.

We can create any of the four types of custom reports.

1. Tabular Reports

2. Summary Reports

3. Joined Reports

4. Matrix Reports

Tabular Reports: These are the basic type of reports which represents the data in the form of a table along with the grand total.

We cannot represent the tabular report data in Chart Components.

While creating a report, we can add one or more user defined filters to filter the records to be visible in the report.

Salesforce provides the below 3 types of filters

1. Field Filter: This filter allows to add one or more user defined conditions based on the fields inside the object, to filter the records in the object.

While adding the multiple conditions to filter the records, the conditions must be separated using Logical Operators.

Ex: Rating == 'Hot'

Location__C == 'Hyderabad'

AnnualRevenue > 4500000

2. Cross-Filter: Using this filter, we can represent the records inside the report from an object, and add the filter conditions on the related objects.

3. Row Limit Filter (Only in Salesforce Classic): This filter is applied to restrict the number of records to be visible inside the report.

**Use Case**: Configure a tabular report to represent all Customer (Account) details along with "Grand Total".

**Use Case**: Configure a Tabular Report to represent all the Customers Information along with the "Grand total" matching with the specified conditions.

1. Account : Active == 'Yes'
2. Account : Rating == 'Hot'
3. Account : AnnualRevenue > 5000000.

**Use Case**: Configure a tabular report to represent all the customers information which are associated with few cases.

**Use Case**: Configure a tabular report, to represent the Top 3 Highest Annual Revenue Account Records.

**Summary Reports**: Summary Reports allows us to group the report data based on "One / More Fields" inside the object. i.e., we can apply the "Row Level Grouping" for the records inside the report.

Summary Reports data can be represented in the form of chart components.

**Use Case**: Configure a summary report to represent the Account Records by dividing them to various groups based on "Rating Field".

1. Schedule the Report, to run every Week Monday and Thursday Evening @ 5.00 PM

2. Prepare a Chart Component for the Report.

3. Add the Bucket Field in the Report to differentiate the customers as below.

    Account: AnnualRevenue <= 50,00,000 ===> BASIC Customer

    Account: AnnualRevenue > 50,00,000 ===> PREMIUM Customer

**Joined Reports**: Joined Reports allows us to combine the Multiple Tabular Reports data into a Single Report i.e., we can add the multiple blocks inside the Joined Report, each block represents different set of data.

1. Joined Reports cannot be schedulable. i.e., we have to run the report manually.

2. We cannot represent the Joined Report data in the form of "Chart Components".

**Use Case:** Configure a Joined Report to represent support cases data in the various blocks based on the "Case Status".

**Matrix Reports**: Matrix Reports allows us to group the report data based on both "Row Level and Column Level" i.e., we can use different fields to apply Row-Level and Column-Level grouping.

Matrix Report data can be represented in Chart Components.

**Use Case:** Configure a Matrix Report to represent the Opportunity Records by applying both Row-Level and Column-Level grouping.

1. Row-Level Grouping ----> Stage Name Field.

2. Column-Level Grouping ----> Probability Field.

1. Represent the Report data in "Chart Component".

2. Schedule the report to run on every week Sunday Morning at 7.00 AM.

**Dashboard**: A dashboard is made up of components. Each component contains a chart or metric that shows data from one report. Different components can show data from different reports.

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

A dashboard can have maximum of 20 chart components.