The Use of Reports vs. List Views

Salesforce provides many options to view and access data. Reports and List Views both provide the ability to filter and sort data. However, there are scenarios when you may prefer to use one over the other. Generally speaking, a list view is used to quickly segment, and then take action on records. A report is used to summarize record data for analysis.

The following table provides a side-by-side comparison of the functionality available for Reports and List Views:

Reports v. Listviews - Comparison

List views sound very similar to reports so a common question is **"When should I use a List View versus a report?"**

	List Views	Reports
In-line editing	X	
Group, Summarize, Calculate		X
Schedule to run		X
Export to Excel		X
Take Immediate Action	X	
View over 2,000 records		X
Combine multiple objects in one view		X

Reports

- Used to summarize, calculate, and analyze data
- Combines data from multiple records
- Standard and Custom Reports
- 4 standard report types: Tabular, Summary, Matrix, or Joined
- Export to Excel or Copy

What you CAN do with Reports:

- Can view data across objects - such as Contacts with a set of Interest Areas and/or Geographies
- Ability to summarize data - such as Activity/Task data (Open for a specific user, All Closed for a time period, etc.)
- You would like to edit one or more records at once (quickly segment data and take action)
- You can schedule reports to run on a set day/time
- You subscribe to scheduled reports to automatically receive the report results.
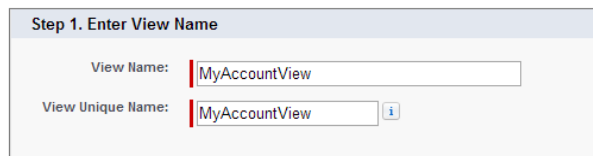
What you CAN'T do with Reports:

- Joined reports do not allow export to Excel

List Views

Creating a ListView

1. Create a list view to see a specific set of contacts, documents, or other object records.
2. Click Create New View at the top of any list page or in the Views section of any tab home page.
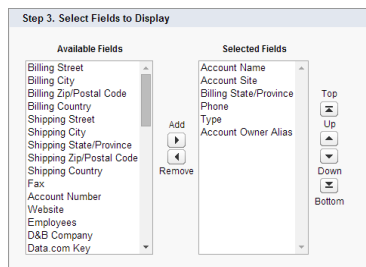3. Enter the view name to display in the views drop-down list.

4. Specify your filter criteria. If you want more filter fields, click Add Filter Logic... and then Add Row. You can have up to 10 fields in your filter criteria.
5. Select the fields you want to display on the list view.
6. The default fields are automatically selected. From the fields that are in your page layout, you can display up to 15 different fields in your view.
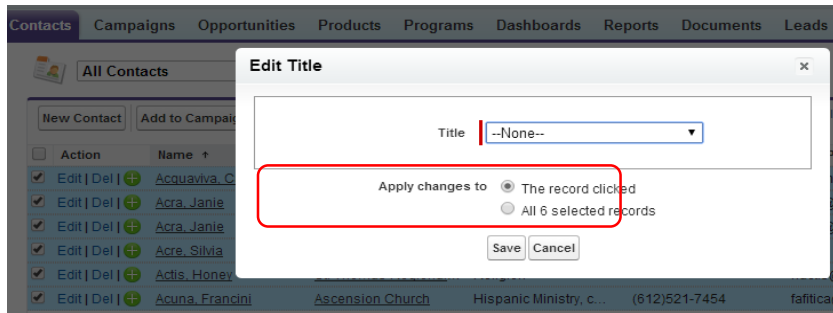

7. Click Save. The view appears in the View drop-down list so you can access it later.

Pros:

- Basic filtered views of records
- Quickly segment data (by any criteria on the record)
- View information from a single object
- Ability to use In-line editing for mass edits

- Allows users to create views specific to them
- Can filter and "report" on data while viewing data on an object
- Ability to use the List View results to mass edit records - such as following multiple records and editing data on multiple records
- Group, summarize, and perform calculations of data (analysis)
- Schedule a report to run, subscribe to the report to receive the results via email
- Easily export information out to Excel

Cons:

- Cannot export data
- Data limited to a single object