Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.
types of report formats in Salesforce:

1.Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3.Matrix Reports:

Report types:
Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.
A report type cannot include more than 4 objects.
Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Type:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with "Manage Custom Report Types" permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

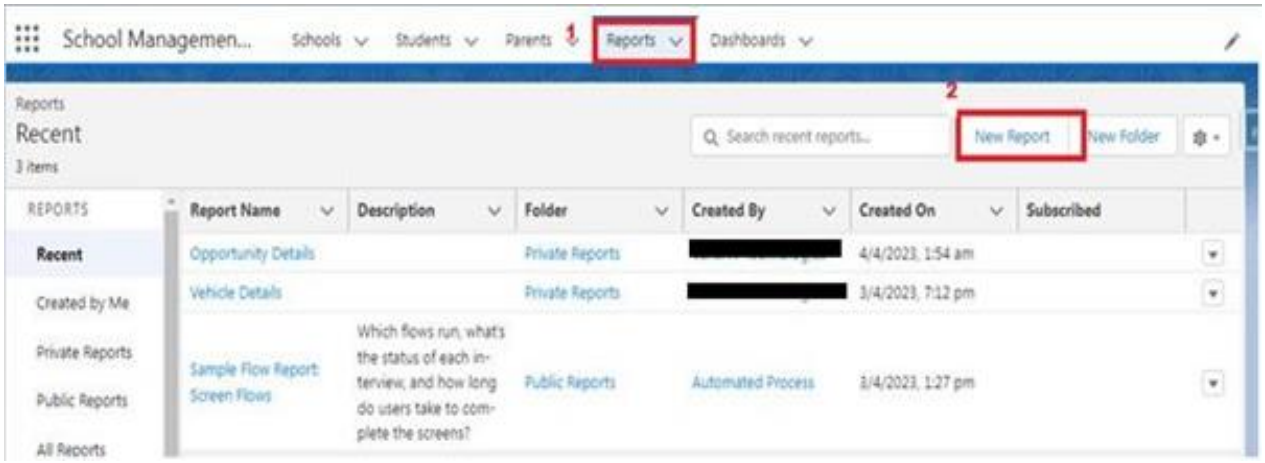
There are 3 types of access levels of folders:
1. Viewer:
With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.
2. Editor:
With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.
3. Manager:
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

From this milestone we are going to import the data and create the reports and dashboards for data visualization in the application

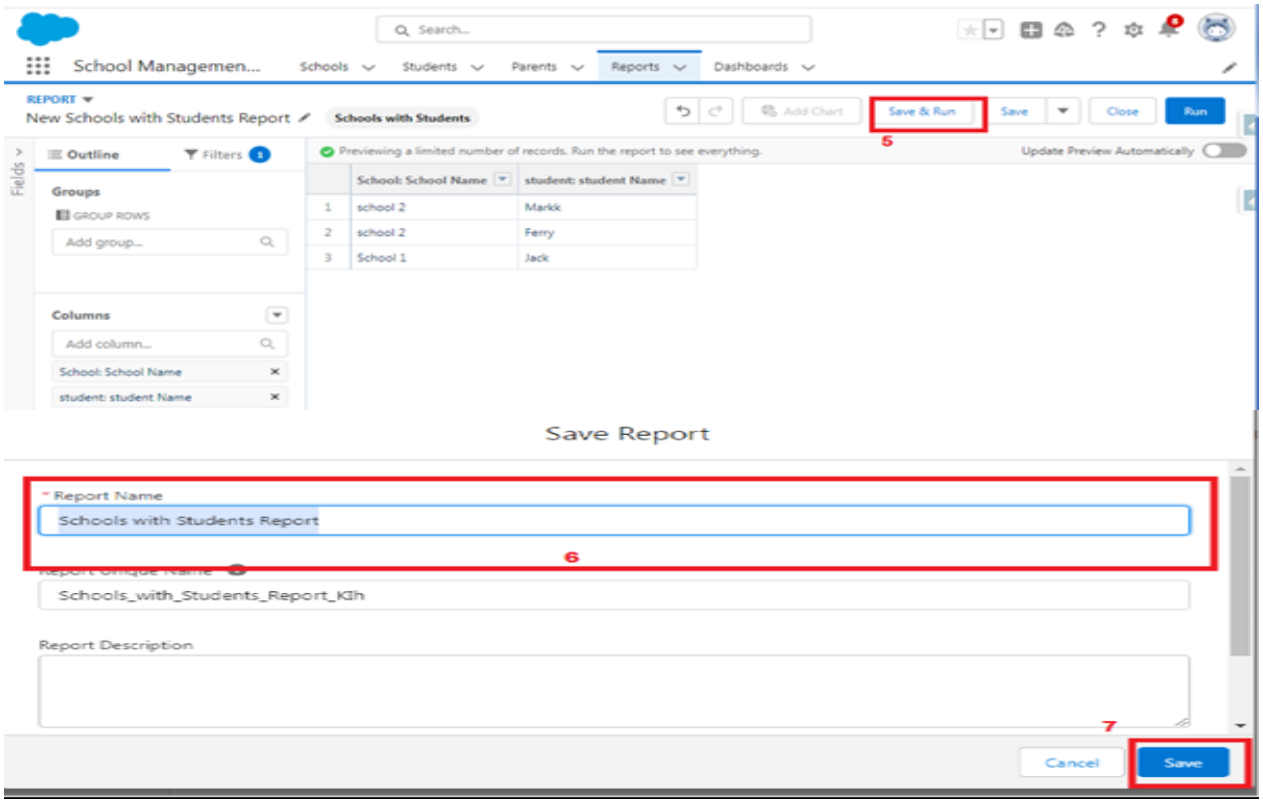
➢ Create Report

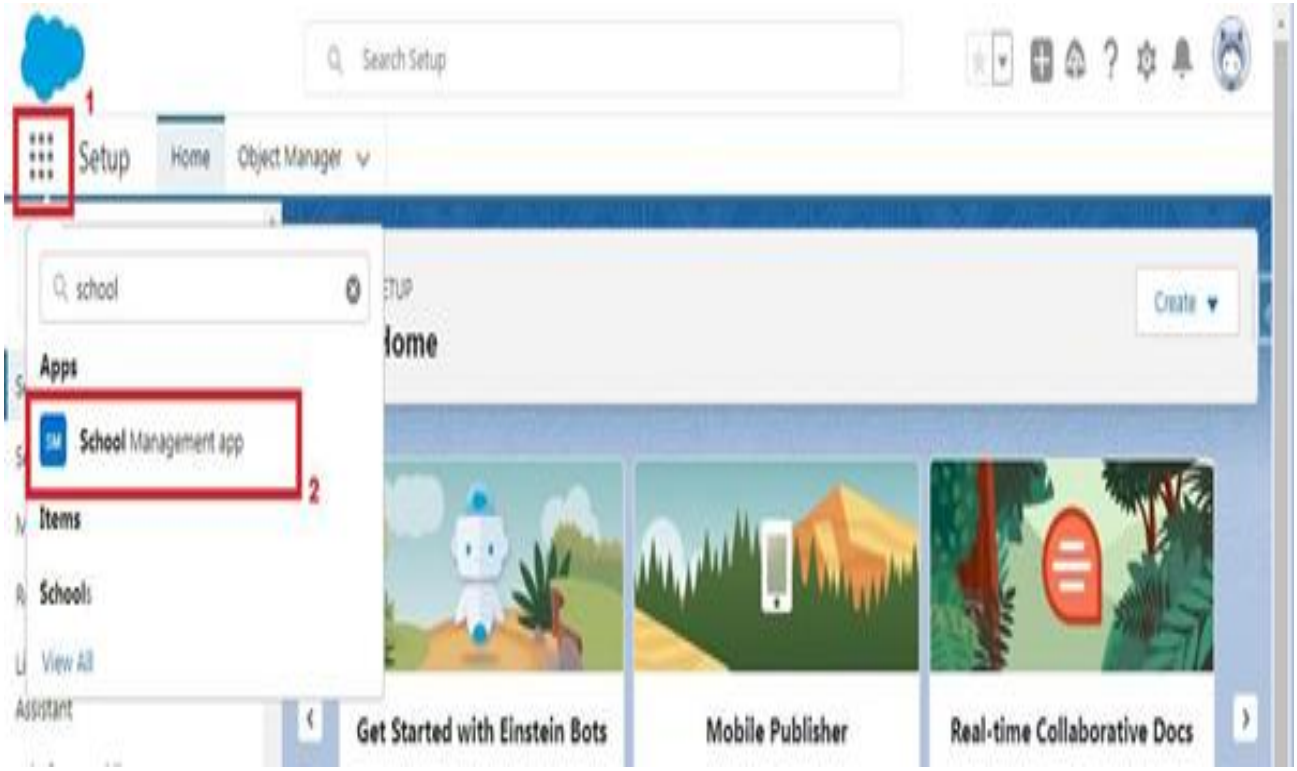
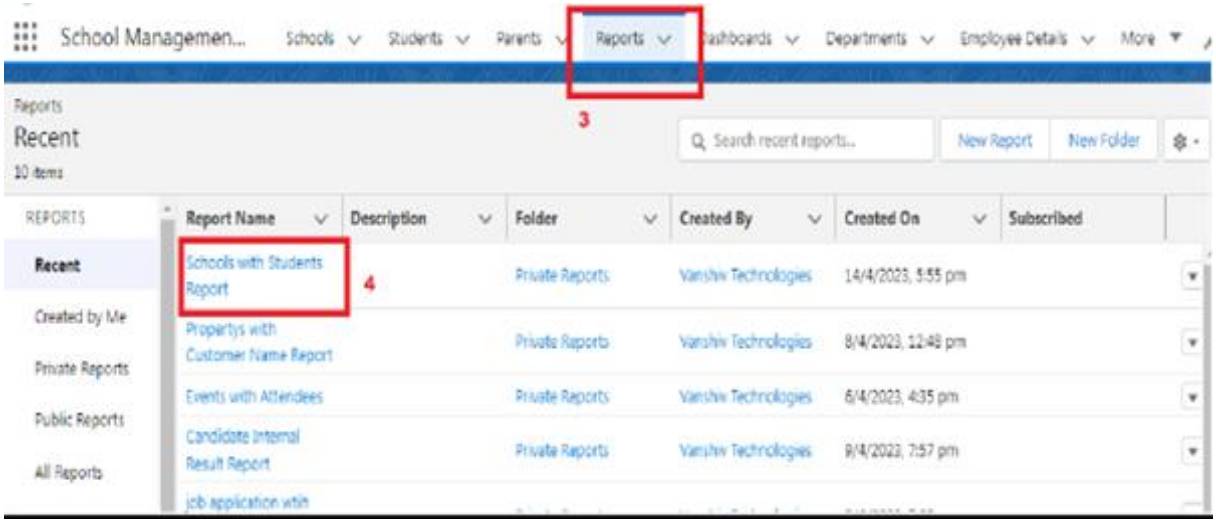
Reports:

1. In School Management App click Reports tab.
2. Click New Report.
3. Select the report type as School with students and parents for the report.
4. Click start report.
5. Customize your report, then save and run
6. Give report name – Schools with Students Report
7. Click Save
    - NOTE: In this report you can see your all record of the object you selected for reporting (What you Selects in "Select a report type option").


School Managemen...
Schools
Students
Parents
Reports
Dashboards
1
2
Reports
Recent
3 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
Report Name
Description
Folder
Created By
Created On
Subscribed
Opportunity Details
Private Reports
4/4/2023, 1:54 am
Vehicle Details
Private Reports
3/4/2023, 7:12 pm
Sample Flow Report: Screen Flows
Which flows run, what's the status of each interview, and how long do users take to complete the screens?
Public Reports
Automated Process
3/4/2023, 1:27 pm

Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Select a Report Type
sch
Report Type Name
Category
Schools
Standard
Schools with Students
Standard
3
Details
Schools with Students
Standard Report Type
Start Report
4
Details
Fields (28)
Created By You


School Managemen...
Schools
Students
Parents
Reports
Dashboards
REPORT
New Schools with Students Report
Schools with Students
Add Chart
Save & Run
Save
Close
Run
5
Outline
Filters
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Columns
Add column...
School: School Name
student: student Name
School: School Name
student: student Name
1 school 2 Markk
2 school 2 Ferry
3 School 1 Jack
Save Report
* Report Name
Schools with Students Report
6
Schools_with_Students_Report_KIh
Report Description
7
Cancel
Save

➢ View Report

1. Click on App Launcher on left side of screen.
2. Search School Management App & click on it.
3. Click on Reports Tab.
4. Click on School with Students report and see records