1. Reports & Dashboards for Lightning Experience
2. Format Reports

Format Reports

Learning Objectives

After completing this unit, you'll be able to:

- Describe report formats: tabular, summary, and matrix.
- Create a matrix report.

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	✓ *		✓		
Summary	Group and summarize	✓	✓	✓	✓	
Matrix	Group and summarize, by row and column	✓	✓	✓	✓	

* Row limit required. Learn more here.

** Bucket fields and formulas are not covered in this module.

Let's walk through building a sample report for each report format.

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. While easy to set up, they can't be used to create groups of data and there are limits to how you can use them in dashboards. Consequently, they're often best used for tasks like generating a mailing list, so when Lincoln asked Maria for a report of all open opportunities, Maria knew that a tabular report would fit the bill.

Let's help Maria build the tabular report!

Note

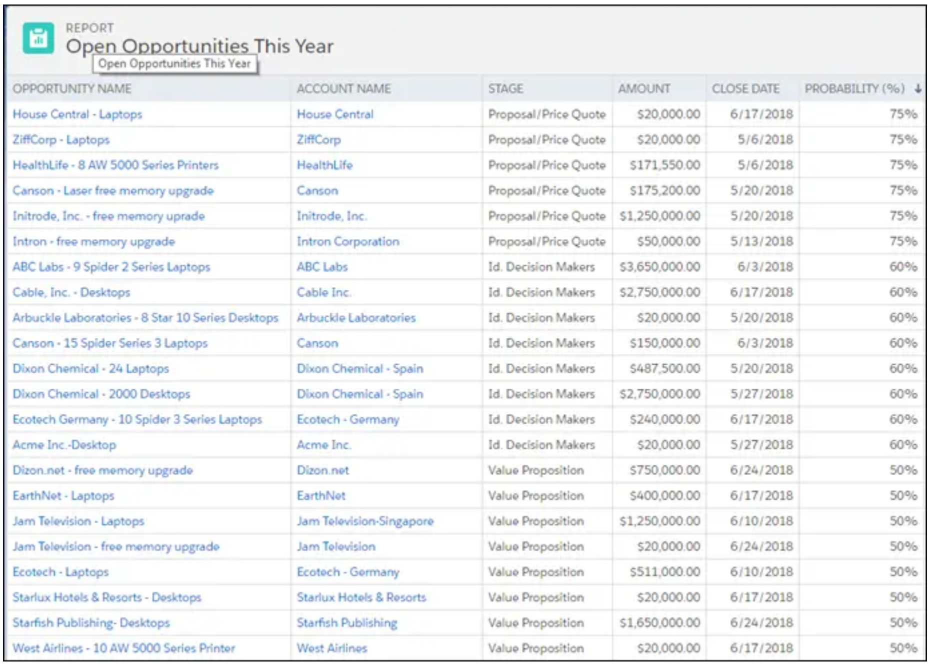
Depending on which org you're using to practice these steps, you may or may not see data in your report at runtime.

1. On Reports, click **New Report**, choose the 'Opportunities' report type, and click **Continue**.
2. Click FILTERS, then apply the following filters:
    a. For the Show Me standard filter, select **All opportunities** and click **Done**.

   b. For the Opportunity Status standard filter, select **Open** and click **Apply**.
   c. For the date standard filter, select **Created Date** and **Current FY** for the range and click **Apply**.

> **Note**
>
> For the fastest results, always set the smallest date range you can. If your report has to sift through a great many dates, it can take longer to show the information you've asked for.

3. The following columns should already be included in your report: Opportunity Name, Type, Lead Source, Amount, Close Date, Next Step, Stage, Probability (%), Fiscal Period, Age, Created Date, Opportunity Owner, Owner Role, Account Name.
4. Click **Save**.
5. Name your report `Open Opportunities This Year` .
6. Enter a description and save the report in the Public Reports folder.
7. Click **Run**. The report should look something like this:


REPORT
Open Opportunities This Year
Open Opportunities This Year

OPPORTUNITY NAME	ACCOUNT NAME	STAGE	AMOUNT	CLOSE DATE	PROBABILITY (%) ↓
House Central - Laptops	House Central	Proposal/Price Quote	$20,000.00	6/17/2018	75%
ZiffCorp - Laptops	ZiffCorp	Proposal/Price Quote	$20,000.00	5/6/2018	75%
HealthLife - 8 AW 5000 Series Printers	HealthLife	Proposal/Price Quote	$171,550.00	5/6/2018	75%
Canson - Laser free memory upgrade	Canson	Proposal/Price Quote	$175,200.00	5/20/2018	75%
Initrode, Inc. - free memory uprade	Initrode, Inc.	Proposal/Price Quote	$1,250,000.00	5/20/2018	75%
Intron - free memory upgrade	Intron Corporation	Proposal/Price Quote	$50,000.00	5/13/2018	75%
ABC Labs - 9 Spider 2 Series Laptops	ABC Labs	Id. Decision Makers	$3,650,000.00	6/3/2018	60%
Cable, Inc. - Desktops	Cable Inc.	Id. Decision Makers	$2,750,000.00	6/17/2018	60%
Arbuckle Laboratories - 8 Star 10 Series Desktops	Arbuckle Laboratories	Id. Decision Makers	$20,000.00	5/20/2018	60%
Canson - 15 Spider Series 3 Laptops	Canson	Id. Decision Makers	$150,000.00	6/3/2018	60%
Dixon Chemical - 24 Laptops	Dixon Chemical - Spain	Id. Decision Makers	$487,500.00	5/20/2018	60%
Dixon Chemical - 2000 Desktops	Dixon Chemical - Spain	Id. Decision Makers	$2,750,000.00	5/27/2018	60%
Ecotech Germany - 10 Spider 3 Series Laptops	Ecotech - Germany	Id. Decision Makers	$240,000.00	6/17/2018	60%
Acme Inc.-Desktop	Acme Inc.	Id. Decision Makers	$20,000.00	5/27/2018	60%
Dizon.net - free memory upgrade	Dizon.net	Value Proposition	$750,000.00	6/24/2018	50%
EarthNet - Laptops	EarthNet	Value Proposition	$400,000.00	6/17/2018	50%
Jam Television - Laptops	Jam Television-Singapore	Value Proposition	$1,250,000.00	6/10/2018	50%
Jam Television - free memory upgrade	Jam Television	Value Proposition	$20,000.00	6/24/2018	50%
Ecotech - Laptops	Ecotech - Germany	Value Proposition	$511,000.00	6/10/2018	50%
Starlux Hotels & Resorts - Desktops	Starlux Hotels & Resorts	Value Proposition	$20,000.00	6/17/2018	50%
Starfish Publishing- Desktops	Starfish Publishing	Value Proposition	$1,650,000.00	6/24/2018	50%
West Airlines - 10 AW 5000 Series Printer	West Airlines	Value Proposition	$20,000.00	6/17/2018	50%

Summary Reports

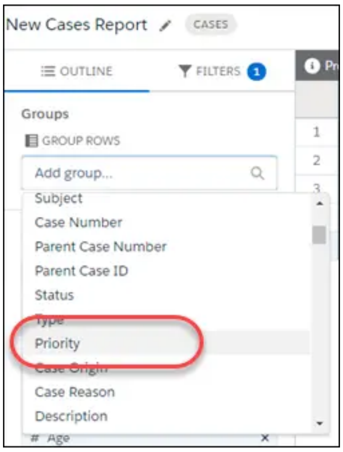
Summary reports are similar to tabular reports, but also allow you to group rows of data, view subtotals, and create charts. Summary reports give us many more options for organizing the data, and are great for use in dashboards. Yes!

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

Roberto Alvarez, COO of Ursa Major Solar, wants to review all open customer support cases, grouped by priority. Let's help Maria help Roberto by building a summary report.

> **Note**
>
> Depending on which org you're using to practice these steps, you may or may not see data in your report at runtime.

1. From the Reports tab, click **New Report**, choose the 'Cases' report type from the Customer Support Reports folder, and click **Continue**.
2. Click **FILTERS**, then apply these standard filters:
   a. For Show Me, select **All Cases** and click **Apply**.
   b. For Date Field, select **Opened Date** and **All Time** for the range. Then click **Apply**.
3. From the **Add filter...** picklist, apply a field filter for cases where **Open** equals **True**.
   a. Search for and select **Open**.
   b. From the dropdown list, select **True** and click **Apply**.
4. Verify that these columns appear in your report: Case Owner, Subject, Date/Time Opened, Age, Open, Closed, and Account Name. If necessary, add them.
5. To make this report a summary report, you need to group rows. To group rows, first click **OUTLINE**.
6. Under GROUP ROWS, from the **Add group...** picklist, select **Priority**.



7. Turn off **Detail Rows** at the bottom of the preview page to see just the totals for each priority level.
8. Save the report as `Open Cases for All Time` , and accept the auto-generated unique name.
9. Enter a description, choose the Public Reports folder, and click **Save**.
10. Click **Run**. The report should look something like this:

> **Note**
>
> Click **Detail Rows** to toggle between showing and hiding columns in your summary report.

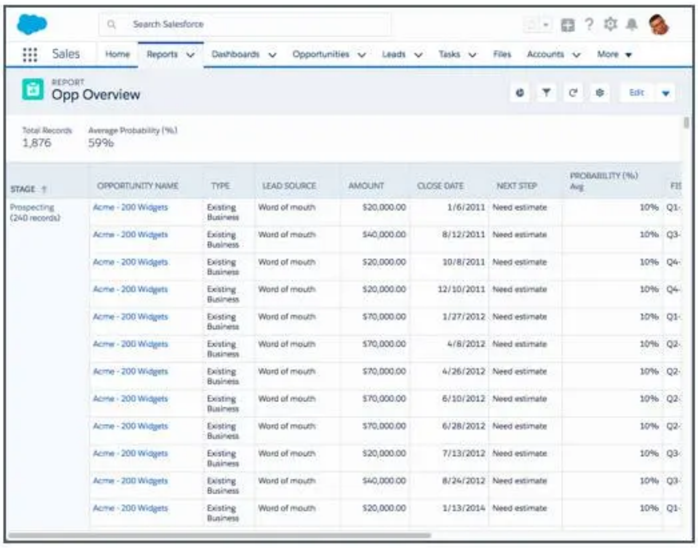
Matrix Reports

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.

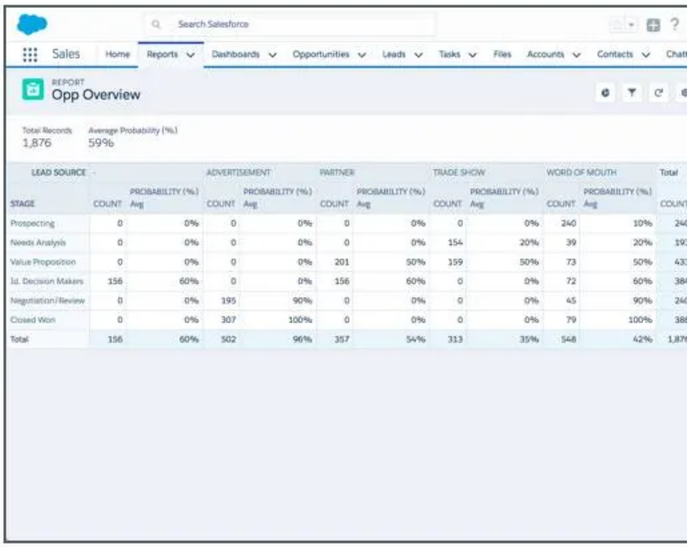
So why would you want to use a matrix report? If you’re looking for an at-a-glance overview of data, especially for something like totals of revenue or quantity of products sold, then the matrix report format is for you.

To illustrate the point, let’s look at two reports, side by side. The use case here is opportunities for last fiscal quarter, grouped by close month, with the amount summarized. Which report gives you an easier at-a-glance view of the same data?

Summary



Matrix



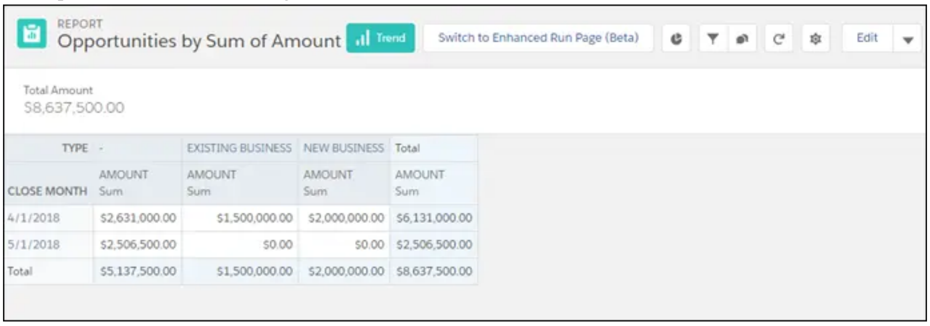
Now that you're convinced, let's build a matrix report. Sita, the CEO, is planning for the coming year and wants to know revenue trends, month over month.

Let's start by helping Maria create the basic report. In this step, we'll create a matrix report showing sales by type for each month.

1. On the Reports tab, click **New Report**, choose the 'Opportunities' report type, and click **Continue**.
2. Click FILTERS, then apply these standard filters:
    a. For the Show Me standard filter, select **All Opportunities** and click **Done**.
    b. For the Opportunity Status standard filter, select **Closed Won** and click **Apply**.
    c. For the Date Field standard filter, select **Close Date**. For Range, select **Current FY**. Click **Apply**.

> **Note**
>
> For the fastest results, always set the smallest date range you can. If your report has to sift through a great many dates, it can take longer to show the information you've asked for.

3. To summarize the report by Sum of Amount, click the More actions dropdown arrow on the Amount column. Then, click **Summarize** and select **Sum**.
4. To change the report format to matrix, first group rows by Close Month and columns by type. To start grouping, click **Outline**.
    a. Under GROUP ROWS, from the **Add group...** picklist, select **Close Month**.
    b. Under GROUP COLUMNS, from the **Add group...** picklist, select **Type**.
5. You may want to hide the report details when viewing a matrix report. Matrix reports are usually easiest to consume with details hidden. To hide the report details, turn off **Detail Rows**.
6. Save your report as `Opportunities by Sum of Amount` and accept the auto-generated unique name.
7. Click **Run Report**.
8. The report should look something like this.



TYPE / CLOSE MONTH	- AMOUNT Sum	EXISTING BUSINESS AMOUNT Sum	NEW BUSINESS AMOUNT Sum	Total AMOUNT Sum
4/1/2018	$2,631,000.00	$1,500,000.00	$2,000,000.00	$6,131,000.00
5/1/2018	$2,506,500.00	$0.00	$0.00	$2,506,500.00
Total	$5,137,500.00	$1,500,000.00	$2,000,000.00	$8,637,500.00

Resources

- [Choose a Report Format]

Get Ready

You'll be completing this challenge in your own personal Salesforce environment. Choose from the dropdown menu, then click **Launch** to get started. If you use Trailhead in a language other than English, set the language of your Trailhead Playground to English before you attempt this challenge. Want to find out more about using hands-on orgs for Trailhead learning? Check out the Trailhead Playground Management module.

Your Challenge

Create a report to show cases
Roberto Alvarez, Ursa Major Solar's COO, has asked for a report of the company's customer service cases. He wants the report formatted so he can see at a glance which cases are new, working, escalated, and closed. Create a summary report of cases to show Roberto.

- Report type: **Cases**
- Report name: **Case Status**
- Range: **All Time**
- Include these fields: **Case Owner**, **Subject**, and **Account Name**
- Group by: **Status**
- Save the report in any folder

My Trailhead Playground 3

Launch

Check challenge to earn 500 points