

Reporting in SFDC - Definition

Overview

In this section, you will find information about reports and dashboards available in Salesforce

- Difference between reports and dashboard
- The different types of reports

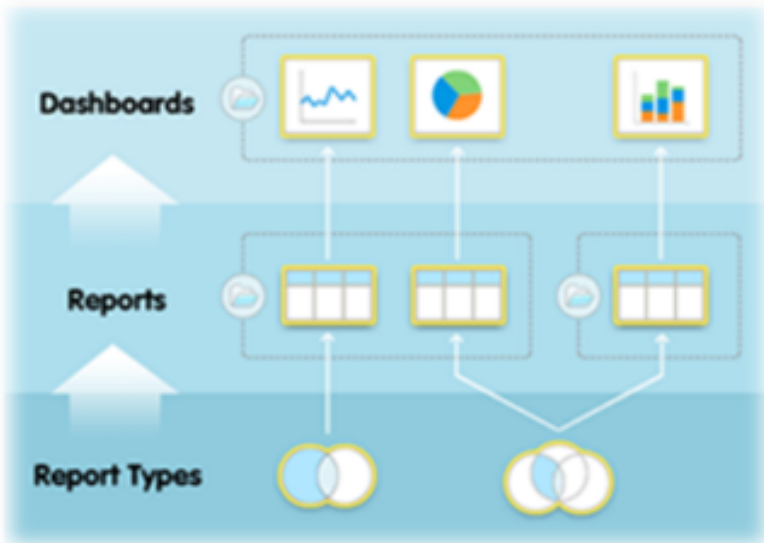
Concerned profiles:

ALL

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Step By Step

Reports & Dashboards	
<p>Report</p> <p>A report returns a set of records that meets certain criteria, and displays it in organized rows and columns</p> <p>Data can be filtered, grouped, and displayed graphically as a chart</p> <p>Dashboard</p> <p>A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages</p> <p>Snapshot of key metrics and performance indicators for the organization</p>	

Dashboard Component

Each dashboard can have up to 20 components in 3 columns

Each dashboard component has a source report that filters the data to display

Reporting Folder

Place where reports and dashboards are stored

Controls who has access to which reports and dashboards.



Notes about folders & accesses

- There are **2 types of folders** : **report folders** & **dashboard folders**. It is impossible to have both reports and dashboards in the same folder.
- **Visibility is managed at folder level**: if you have access to a folder, you will have access to all dashboards in this folder.

Folder accesses management

Each GBU has:

Definitions: Types of Reports

1 report folder to store reports created by GBU users

Tabular Report

Report folder to store source reports of GBU dashboards

Similar to a **spreadsheet**, they consist simply of an ordered set of fields in columns, with each matching record listed in a row

1 dashboard folder to store dashboards specific to the GBU

Summary Reports

Each GBU or GBU will access those 3 folders.

Summary Reports are similar to tabular reports, but also allow users to **group rows of data**, view subtotals, and create charts

Matrix Report

There is one cross GBU folders (source reports and dashboards) to store dashboard used by all GBUs. All users have access to those folders.

Matrix Reports are similar to summary reports but allow **grouping and summarizing data by both rows and columns**

Illustration of the different report types

Tabular reports can't be used to create graphs or group data

Reviewer: Owner Name	Reviewer: Created Date	Job Application: Candidate	Job Application: Position	Job Application: Status
Cynthia Capobianca	6/10/2010	C-00001	Benefits Specialist	Phone Screen
George Abitbol	6/10/2010	C-00001	Benefits Specialist	Phone Screen
George Abitbol	6/10/2010	C-00008	Documentation Writer	Rejected
Cynthia Capobianca	6/10/2010	C-00008	Documentation Writer	Rejected
Dave Carroll	6/10/2010	C-00008	Documentation Writer	Rejected
Cynthia Capobianca	6/10/2010	C-00012	St. JJ Designer	Extend an Offer
Cynthia Capobianca	6/10/2010	C-00009	DBS	Rejected
Cynthia Capobianca	6/10/2010	C-00014	St. Benefits Specialist	Hired
Cynthia Capobianca	6/10/2010	C-00017	Inside Sales Rep	Hired
Cynthia Capobianca	6/10/2010	C-00008	St. Benefits Specialist	Phone Screen
Dave Carroll	6/10/2010	C-00008	St. Benefits Specialist	Phone Screen
Cynthia Capobianca	6/10/2010	C-00003	Documentation Writer	New
Cynthia Capobianca	6/10/2010	C-00008	Documentation Writer	Schedule Interviews
Grand Totals (12 records)				

Summary reports allow you to create a graph and group rows of data

Reviewer: Owner Name	Reviewer: Created Date	Job Application: Candidate	Job Application: Position	Job Application: Status
Reviewer: Owner Name: Cynthia Capobianca (9 records)				
6/10/2010	C-00001	Benefits Specialist	Phone Screen	Rejected
6/10/2010	C-00008	Documentation Writer	Phone Screen	Rejected
6/10/2010	C-00012	St. JJ Designer	Extend an Offer	Rejected
6/10/2010	C-00009	DBS	Rejected	Rejected
6/10/2010	C-00014	St. Benefits Specialist	Hired	Rejected
6/10/2010	C-00017	Inside Sales Rep	Hired	Rejected
6/10/2010	C-00008	St. Benefits Specialist	Phone Screen	Rejected
6/10/2010	C-00003	Documentation Writer	New	Rejected
6/10/2010	C-00008	Documentation Writer	Schedule Interviews	Rejected
Grand Totals (13 records)				

Matrix reports allow you to create a graph and group both rows and columns of data

Reviewer: Owner Name	Job Application: Position	Benefits Specialist	DBS	Documentation Writer	Inside Sales Rep	St. Benefits Specialist	St. JJ Designer	Grand Totals	Reviewer: Created Date	Job Application: Candidate	Job Application: Status
Cynthia Capobianca	Record Count	1	1	1	1	1	0	5	6/10/2010	C-00001	Phone Screen
Cynthia Capobianca	Record Count	1	1	1	1	1	0	5	6/10/2010	C-00008	Rejected
Cynthia Capobianca	Record Count	1	1	1	1	1	0	5	6/10/2010	C-00008	Rejected
Cynthia Capobianca	Record Count	1	1	1	1	1	0	5	6/10/2010	C-00008	Schedule Interviews
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00003	New
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00012	Hired
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00017	Hired
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00014	Phone Screen
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00008	Phone Screen
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00008	Phone Screen
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00003	Phone Screen
Dave Carroll	Record Count	0	0	1	0	1	0	2	6/10/2010	C-00008	Rejected
Grand Totals											

Employee Interviewers

Employee Interviewers

Viewing a Dashboard

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1. Click on Dashboard tab

2. Select the Dashboard to view

3. Click on the component to view the data in a report

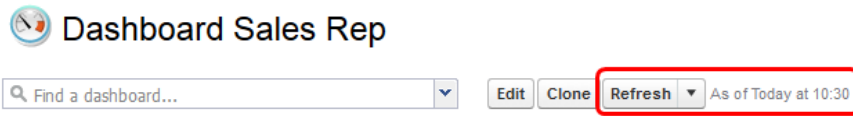
The screenshot shows a CRM dashboard with the following components:

- Meetings per Month and per Type:** A bar chart showing the number of meetings per month from July 2015 to December 2015, categorized by meeting type: Conference, E-mail, In Person, and Phone Call.
- Weighted Pipeline (95%) per Month:** A bar chart showing the sum of weighted opportunities per month from July 2015 to June 2016, categorized by stages: 1. Qualify, 2. Lab Testing, 3. Industrial Testing, 4. Negotiate, and 5. Closed Won.
- Visit Reports per Month:** A line chart showing the number of visit reports per month from July 2015 to December 2015.
- Pipeline per Month and per Stage:** A bar chart showing the sum of weighted opportunities per month from July 2015 to June 2016, categorized by stages: 1. Qualify, 2. Lab Testing, 3. Industrial Testing, 4. Negotiate, and 5. Closed Won.
- My Opportunities with no Stage Change:** A table listing opportunities with their names and probabilities.
- My Open Opps with Past Closed Date:** A table listing open opportunities with their names and expected treaty revenues.
- My Tasks with Due Date in the Past:** A bar chart showing the number of tasks with due dates in the past.

Refreshing a Dashboard

Dashboards do not dynamically refresh to show the latest data.

You need to Refresh your Dashboard to see the current data represented in the charts by clicking on the Refresh button.



The display on the right hand side of the screen shows you the last time the Dashboard was refreshed.

Note that if you refresh a Dashboard, it refreshes automatically for all users who have access to it.

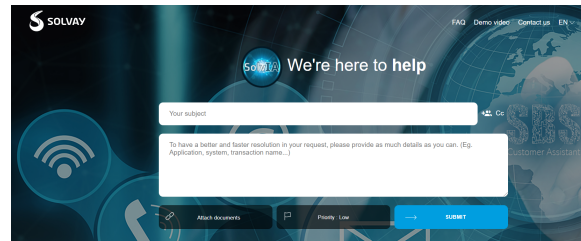
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Related articles

- [Introduction SFDC & Qlikview](#)
- [Qlikview - Analytics](#)
- [Reporting in SFDC – Create reports in SFDC](#)
- [Reporting in SFDC - Viewing existing reports in SFDC \(depends on profile\)](#)
- [Opportunity with end use \(report\)](#)
- [Reporting on GBU Segmentation Fields in SFDC.](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example