

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

Report

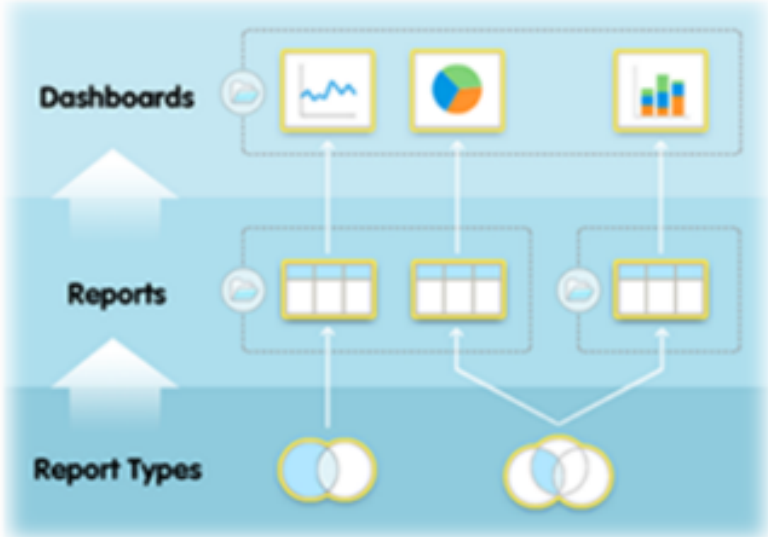
A **report returns a set of records** that meets certain criteria, and displays it in organized rows and columns

Data can be filtered, grouped, and displayed graphically as a chart

Dashboard

A **dashboard shows data from source reports as visual components**, which can be charts, gauges, tables, metrics, or Visualforce pages

Snapshot of key metrics and performance indicators for the organization



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

1 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 Report

Each user of the GBU will access those 3 folders.

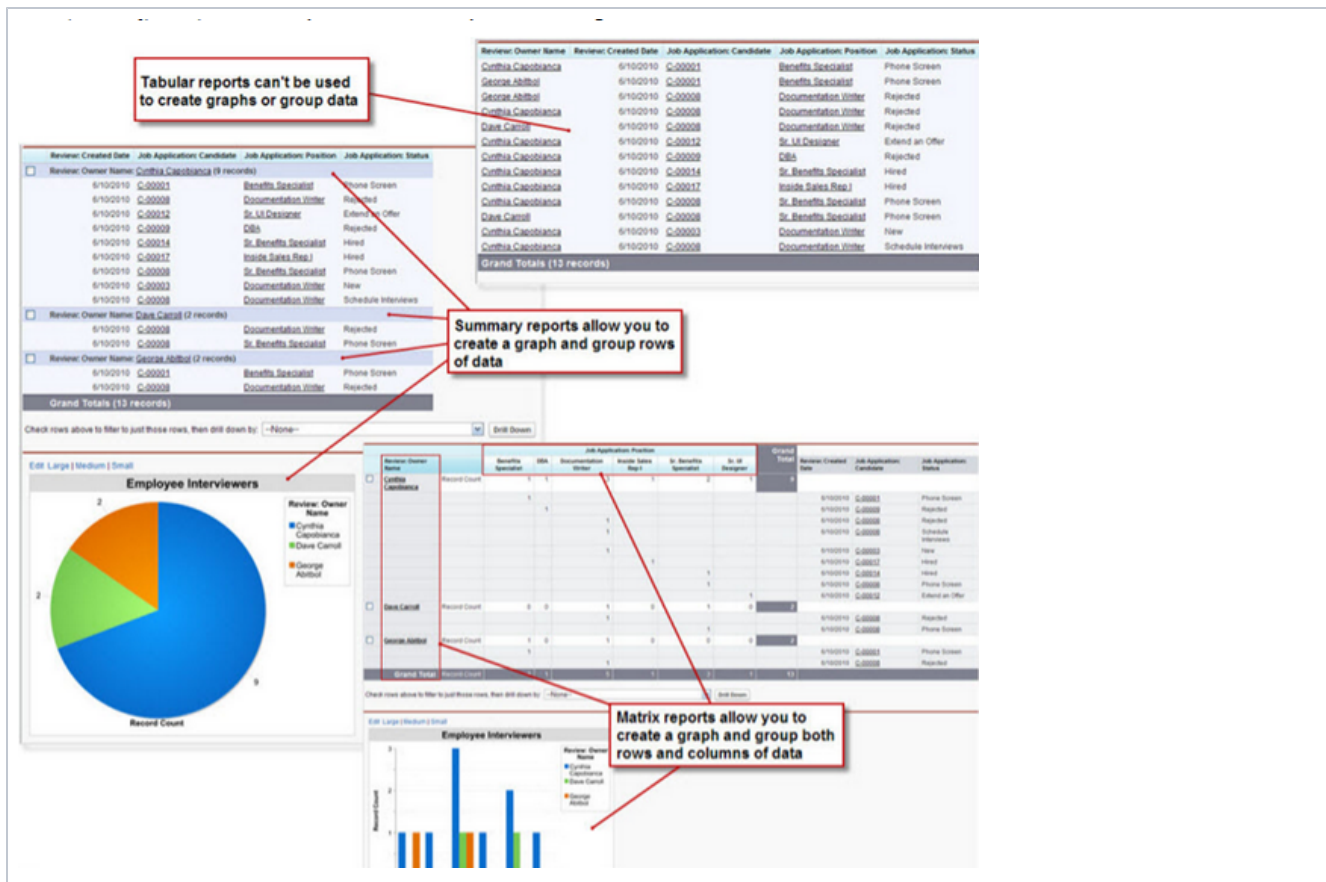
Summary Reports are similar to tabular reports, but also allow users to **group rows of data**, view subtotals, and create charts

Matrix Report

There is also 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



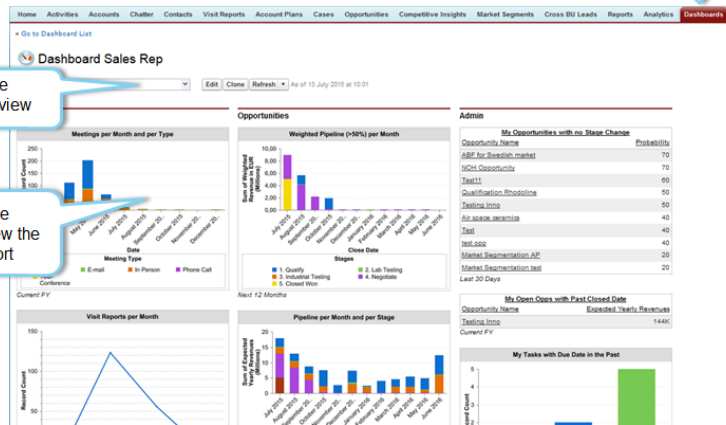
Viewing a Dashboard

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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



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.

Dashboard Sales Rep

Edit Clone Refresh As of Today at 10:30

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.

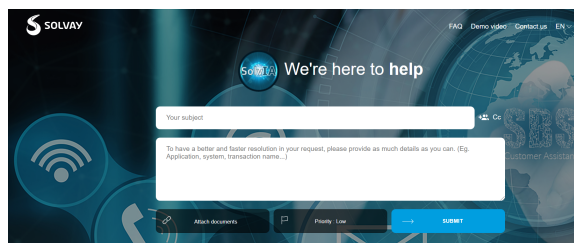
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Related articles

- [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