

Reporting in SFDC – Select the right Report Type

Overview

In this section, you will find some tips in order to select the report type you need.

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Concerned profiles:

ALL

Step By Step

When you create a new report, the selection of the report type is a critical step.

It determines:

- the **fields** you will be able to use as columns in the report,
- the **fields** you will be able to filter on,
- the **pre-filters** displayed report on customization page,
- and of course, the **data** displayed in the report.

Be very careful when you select the report type, because **there is no possibility to change it** once your report is created.

Create New Report

☐ Select Report Types to Hide ⓘ

Select Report Type

Quick Find

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Other Reports

Preview

Account Report

Account	Owner	Account Name	Account Site
Joe Johnson		Acme, Inc	Headquarters
Shelly Smith		Gerwatt, Inc	Headquarters
Tom Thompson		Gene Points	Headquarters

Report Type: Opportunities
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All | # |

Quick Find

Drag and drop to add fields to the report.

Bucket Fields

- Opportunity Information
 - Created By
 - Created Alias
 - Last Modified By
 - Last Modified Alias
 - Opportunity Name
 - Type
 - Opportunity Record Type
 - Lead Source
 - Primary Partner
 - Opportunity Currency
 - Amount
 - Amount (converted)

Fields available

Filters: Add

Show: All opportunities | Opportunity Status: Any | Probability: All

Date Field: Close Date | Range: Current FQ | From: 01/07/2016 | To: 30/09/2016

To add filters, click Add.

Pre-filters

Preview Tabular Format Show Remove All Columns

Opportunity Name	Type	Lead Source	Amount	Expected Revenue
Rhovani Nat CW Evaluation	-	-	USD 78 000,00	USD 50 700,00
cubical divider	-	-	USD 76 000,00	USD 15 200,00
SGMW door window control parts	-	-	USD 94 500,00	USD 47 250,00
Bearing cage	-	-	USD 342 400,00	USD 171 200,00
Household blender cover	-	-	USD 38 000,00	USD 19 000,00
Dajung-157(ITW Clip 1015CR BRT)	-	-	USD 320 000,00	USD 32 000,00

Some report types are combine several objects.

For instance :

- Cases **with** Case Product Details
- Cases **with/without** Case Product Details

With those two report types, you will have the same fields and filters available, but there is a **major difference with data**:

- Cases **with** Case Product Details --> Will appear **ONLY** the cases which have a product.
- Cases **with/without** Case Product Details --> All cases will appear.

The order of the objects also impact the pre-filters: the first object is the main object.

Let's take an example with the report types:

- Cases with Activities
- Activities with Cases

• Cases with Activities

• Activities with Cases

Report types for Accounts & Contacts

To report on **Accounts and/or Contacts**, you should use:

Report type: "Contacts & Accounts"

To report on **Accounts and GBU Customer Segmentation** you should use:

Report type: "Accounts with GBU Customer Segmentation"

To report on **Accounts and Account Team Members** you should use:

Report type: "Account with Account Teams"

Report types for Activities and Visit Reports

To report on **Tasks and Events**, you should use:

Report type: "Activities"

Report types: "Activities with ..." or Report type: "Cases with Activities" / "Visit Reports with Activities"

To report on **Visit reports**, you should use:

Report type: "Visit reports"

Report types: "Visit reports with ..."

Report types for Cases

To report on **cases** (complaints, customer requests, sample requests), you should use:

Report type: "Cases **with** Case Product Details"

Report type: "Cases **with/without** Case Product Details"

To select a specific type of case in the report, add a filter on "Case Record Type", and select:

- Complaints ("Close ReadOnly Complaint" and "Open Complaint")
- Customer Request
- Sample Request

Report types for Opportunities

To report on **opportunities** and **opportunity product**, you should use:

Report Type: "Opportunity with products"

To report on **opportunities** and **business potential**, you should use:

Report Type: "Opportunities with Product Forecasts"

Note:

▼ Business Potential

Year	Expected Yearly Volume	UoM	Target Unit Price	CM Calculation Method	Contribution Margin (%)	Contribution Margin (Amount)	Yearly Revenue
2017	0.00	1LB	USD 0.00 (EUR 0.00)	%	0.00 %	USD 0.00 (EUR 0.00)	USD 0.00 (EUR 0.00)
2018	0.00	1LB	USD 0.00 (EUR 0.00)	%	0.00 %	USD 0.00 (EUR 0.00)	USD 0.00 (EUR 0.00)
2019	0.00	1LB	USD 0.00 (EUR 0.00)	%	0.00 %	USD 0.00 (EUR 0.00)	USD 0.00 (EUR 0.00)
2020	0.00	1LB	USD 0.00 (EUR 0.00)	%	0.00 %	USD 0.00 (EUR 0.00)	USD 0.00 (EUR 0.00)
2021	0.00	1LB	USD 0.00 (EUR 0.00)	%	0.00 %	USD 0.00 (EUR 0.00)	USD 0.00 (EUR 0.00)

1 2 3 4 5 6 7

Product Forecast Info

- Product Forecast: ID
- Product Forecast: S.No
- CM Calculation Method
- Contribution Margin (%)
- Contribution Margin (Amount)
- Contribution Margin (Amount) (converted)
- Last Commercial Roadmap Update
- Opportunity Product Id
- Opp Probability
- Price
- Price (converted)
- Probability Weighted Revenue
- Probability Weighted Revenue (converted)
- Revenue
- Revenue (converted)
- Unit Of Measure
- Volume
- Year
- Product Forecast: Currency
- Product Forecast: Created By
- Product Forecast: Created Alias
- Product Forecast: Created Date
- Product Forecast: Last Modified By
- Product Forecast: Last Modified Alias
- Product Forecast: Last Modified Date

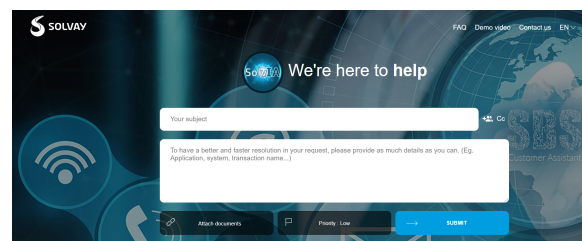
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Related articles

- [Introduction SFDC & Qlikview](#)
- [Qlikview - Analytics](#)
- [Reporting in SFDC - Definition](#)
- [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*