Salesforce trailhead joined reports

After completing this unit, you will be able to: describe four report formats: a tabular, matrix summary, and join. In a matrix report, there are four report formats available for your use: tabular, summary, matrix, and join. The table is the default format. The main use case report format is supported in dashboard report charts that support bucket fields**. Recipe** Formulas across objects** Tabular, list * summary groups, and summarize matrix groups, and summarize by join rows and columns. Show reports side by side in a block * Required row limits Learn more here** Fields and buckets are not covered in this module. Let's take a look at creating a sample report for each report format. As with spreadsheets consisting of a set of fields ordered in a column, each matching record is displayed in a row while easy to set, they can't be used to create groups of data and there are limits on how you can use them in the dashboard. So they are often best used for tasks such as creating mailing lists, making a tabular report! In this example, we wanted to create a list for our account executive about all open opportunities above the specific amount threshold so that she could make publicity this afternoon. Sales usage case: Check all open opportunities above a specific amount limit. On the Report, click New Report. Use the following filters: Select all opportunities for display. Select Open for opportunity status. Select the Create Date field for the date. If your report must sift through a large number of dates, it may take longer to display the information you request. The following columns should be included in your report: Opportunity Name, Type, Lead Source, Amount, Expected Revenue, Closing Date, Next Step, Term, Probability (%), Accounting Period, Age, Creation Date, Opportunity Owner, Owner Role, Account Name, Click Save, Name Your Report. Enter a description and select the My Custom Reports folder. Click Run Report. These reports take the longest time to set up, but they also provide the most detailed view of our data. As with a summary report, a matrix report can contain graphs and use it in dashboards. Watch this short video in matrix reports, so why do you want to use matrix reports? If you are looking for a quick overview of data, especially for something like the sum of revenue or quantity of products sold, then the matrix report format is right for you. In this example, our CEOs want to know the monthly income trend. Start by creating basic reports. In this step, we generate a matrix report that shows sales by type for each month. On the Reports tab, click New Report. Use the following filters: Select all opportunities for display. Select Won for opportunity status. Select close date for the Date field. Select the current fiscal year for the range. Choose the range that best suits the data you want to analyze for the fastest results. If your report must sift through a large number of dates, it may take longer to display the information you request. Click Table Format and change the report format to Matrix Group reports by type by type by dragging the field into the column grouping drop zone. Group a report by closing month by dragging it into the drop zone to group rows. Click the menu for the Number column and select In this field, select Total, and then click Apply, click Show and deselect the number of records. To clear the view, click Save. Enter a description and select the My Custom Reports folder. Joined reports allow you to create different data views from multiple types of reports. In participating reports, data is organized as a block. You can add charts to a consolidated report. Watch this short video in participating reports. If you have two reports and you need an easy way to view them side by side, look at the participating reports. In fact, why stop the second? With participating reports, you can add up to five reports. Try a simple tool to track how a sales representative takes advantage of their opportunities very well. We'll generate a basic opportunity report. Create a new report by selecting Opportunity as report type. Click Table Format, and then select Join. Note that your report data is now set in a box with a color border. Create a new block by dragging the Opportunity Name field into the preview pane to the right of the first block, and then dragging the Number and Account Name fields to the new block. Each blog in our participating reports has its own set of independent filters. Create a third blog in the same way. Now we have three different opportunity reports sitting next to each other in the same container. Now it's all the same, but we don't. To use each one to tell us something unique, we want all the blogs to provide comparable information, namely us. So prepare each block in the same way: Remove all fields except the opportunity name. This helps us focus on what's important here. Click the drop-down menu at the top right of each block and make sure that the number of records is selected. Click the drop-down list next to Number. Click Summarize this field, and then select Totals. Now that we're configuring each blog to tell a different story, we'll use the first blog to show you the chances of getting away. Click on the title (now it says block chance 1) and rename it as closed disappears. In the closed filter panel above, set these filters: The opportunity status equals the Close Date field to Closed Date Date equals Current and Previous Fiscal Year. Rename blog Close wins and set these filters: The opportunity status is equal to the Closed Winning Date field equals the closing date interval equals Current and before FY. Rename the next month's closed block and set these filters: The Date field equals the closed date range equals the next month's opportunity status to Open for the fastest results. Equal filters often return data faster than the active filter. In complex reports, this can make a difference. Now we will group all three blocks by a sales representative. Drag the Opportunity Owner field to the horizontal bar that says Drop Fields Here to group across report blocks (also called grouping drop zones). Click Save, and then run the report. We recently created a useful resource that sales agents can use to monitor their tracking records and to keep on top of the deals warming up. Sign up for an account to continue Get personalized advice for your career goals, hone your skills with challenges and follow-up quizzes and share your progress with employers, connect with mentoring and job opportunities, index content to access information in Salesforce. Show in an easy-to-understand format, share meaningful insights with other users. Before we go a little deeper and discuss different report patterns in detail, let us examine the basics of the report at first glance. When you're preparing a report for your Salesforce data, you're facing. Keep these facts in mind: When a report is well designed, you can use the report to make sure that the report is properly designed. Before you start creating a report, write down several questions that need to be answered. Users who are allowed access to the folder can also view the report. Make sure that the report is always saved in the appropriate manner. Before you create your first report, familiarize yourself with the basic concepts as described below. Report Builder: This is a visible drag tool that can be used to create or edit reports. This is the platform where you can select a report type. Report formats and fields to create the full report. To open a report, just click on the new report. Field: With the field, you can easily describe the results of the report. Imagine that you have one report with each table of contents as a result and each column as a field. Use an example of the Employee table for each employee as a result and the stored data is the field. To run a report quickly Filters: You should restrict access to data in a report using filters. This makes it easy to add, edit, or remove filters when reading a report. Report Type: The report type controls the total number of fields contained in your report. For example, a file or content report contains fields such as ID, name, or download, for example. On the other hand, the account report has an account ID, account name or phone, etc. The first thing to do when generating a report is to make a decision about the type of report. Report format: The report format determines how the report results are placed. There are four possible report formats in Salesforce – tabular, summary, matrix, and join, etc. Participating reports are not available in the Lightning experience, so you can use only three in that case, Salesforce training for administrators & developers is free for industry-level demo professionals, as your trainer is available according to your schedule, existing customer support, sign up for free demo classes, the purpose of this blog is to discuss each file format in detail and how to generate reports in different file formats. Read: How to get certified in 2020 as a Salesforce professional and check certification how to create a tabular report in Salesforce? A tabular report is good for creating a whole list of records or a single grand total. It cannot be used to create chart groups and cannot be accessed in dashboards unless the number of rows is limited. Examples of a tabular report format include mailing. Let us learn how to create a tabular report in Salesforce. Add a filter, such as select all opportunities to display for quick results. If your report must switch between dates, it may take longer to display the information you request. The list of columns that are typically associated with the report is opportunity name, lead source, type number. Expected revenue Closing date Accept the automatically generated unique name and click on the Save option. Now enter a description and select my personal custom report folder. Click the Run report button when all changes are made successfully. You may or may not see the data in the report during runtime. Summary reports are very similar to a tabular report, but allow users to group rows of data. Read: The education guide you need to follow for salesforce's advanced admin certification report generally takes more time to set up, but they have more options to organize data and are great to use with dashboards. We can say that the summary report is workhorses and most reports are only available in this format. So let us start our discussion on how to generate a summary report in Salesforce. Add a filter, such as select all cases to display. If you want to insert additional filters for cases, click the Add button where the status is closed. Selected Closed. Leave the operator set equals, click the search icon, and then select True at the end. The following columns should be included in the summary report, such as case owner, information/opening time, open subject, age opening, or account name, etc. Select the Tabular first option, then select the Summary option from the drop-down list as shown below. You can also add multiple fields to a group. Accept the automatically generated unique name and click on the Save option. Now enter a description and select my personal custom report folder. Click the Run report button when all changes are made successfully. You may or may not see the data in the report during runtime. Use the Hide Fields button to quickly collapse records based on summary fields. Click the Show Fields button to unhide the field again. How to create matrix report in Salesforce? Allows you to group records together by rows and columns. Setting up a matrix report isn't easy, but it always provides a detailed view of the data, just as the matrix report summary reports also have graphs and can also be used in dashboards. So what's unique about matrix reports? If you are looking for an overview of some quick data, such as revenue or quantity of products sold, then the Matrix report is the best option to use here. When we compare a quick view of two report formats, such as summary and matrix, then the second pattern is easy to read and understand. Now you need to make sure that matrix reports are necessary for the organization. Let us see how to create a forward matrix report. Add a filter, such as select all opportunities to display. Always choose the right range for the data you want to analyze. Make sure the range is the smallest for faster results. If your report must switch between dates, it may take longer to display the information you request. Select the tabular option first, then select the Matrix option from the drop-down list as shown below. To do this, it is possible to group reports by type, and then drag the fields to group columns one by one. There are several techniques to group the report and you can choose the best technique as needed. Click the menu for the amount option and select the Summary field. Click Deselect or show record counts. Click the Save and Create matrix report options successfully. You may want to hide some details when creating matrix reports. They are often easy to consume with hidden details. Accept the automatically generated unique name and click on the Save option. Now enter a description and select my personal custom report folder. Click the Run report button when all changes are made successfully. Salesforce training for administrators and personal developers accessing our learning management system to access our courses is part of our free demo class read: How to consolidate accounts & duplicate contacts in Salesforce Lightning? To do this, it is possible to add a chart to the included report. This is a follow-up step when you create a participating report. When creating from a table format, click Join. Now you can notice that the report data is set with a color border. This is your first blog. Create a new blog by dragging the opportunity name from the preview pane, and then dragging the amount or account name. In the same way, create multiple blogs and make sure that each blog should provide comparable information as needed. Now configure the blocks correctly and group them together as needed. This way, you can create reports in different formats according to the project's needs. Creating and maintaining reports is always easy with the right methods and processes. In case of any doubts, you should join our Salesforce Certification Training Course for practical learning. Read: Wrapper Class Salesforce Instruction Manual for Beginners in 2020 Coming Up 4 Days December 2020 Upcoming Classes 6 Days 28 Dec 2020 Upcoming Classes 1 Day 23 December 2020 3 Days Coming December 2020 1 Day 22 3 December 2020 2020 Upcoming Classes 3 Days 25 Dec 2020 10 Days 01 Jan 2021 Upcoming Classes 3 Days 25 Dec 2020 17 Days 08 Jan 2020 2021 Upcoming 4 Days 26 Dec 2020 Upcoming Models 38 Days 29 Jan 2021 Upcoming Classes -0 Days 22 Dec 2020 2020