



Reporting Tips: Keeping Data Manageable



Reports require accurate and hygienic data. Without this, the reports will not reflect the organization's work. Once you ensure your data is clean and ready, how can you best show results in reports? We focus on the following three areas to expand your reporting skills in

Salesforce:

- Unique Count to ensure data is counted once
- Formulas in Reports to calculate information directly in the report
- Field to Field Filters to filter data based on fields in the report

Having unique data labels, creating formulas, and applying the right filters can save you time as Salesforce does the work for you.

Unique Count

Adding the Unique Count to a field, click on the down arrow next to the field name and select Show Unique Count. This will give a deduplicated count for the Account.

Account ID	Account Name	Account ID	Account Name
0011000001AAG12	Greenwood Household	0011000001AAG12	Greenwood Household
0011000001AAG13	Bluewood Household	0011000001AAG13	Bluewood Household
0011000001AAG14	Yellowwood Household	0011000001AAG14	Yellowwood Household
0011000001AAG15	Redwood Household	0011000001AAG15	Redwood Household
0011000001AAG16	Blackwood Household	0011000001AAG16	Blackwood Household
0011000001AAG17	Whitewood Household	0011000001AAG17	Whitewood Household
0011000001AAG18	Greywood Household	0011000001AAG18	Greywood Household
0011000001AAG19	Lightwood Household	0011000001AAG19	Lightwood Household
0011000001AAG20	Darkwood Household	0011000001AAG20	Darkwood Household
0011000001AAG21	Lightwood Household	0011000001AAG21	Lightwood Household
0011000001AAG22	Darkwood Household	0011000001AAG22	Darkwood Household
0011000001AAG23	Lightwood Household	0011000001AAG23	Lightwood Household
0011000001AAG24	Darkwood Household	0011000001AAG24	Darkwood Household
0011000001AAG25	Lightwood Household	0011000001AAG25	Lightwood Household
0011000001AAG26	Darkwood Household	0011000001AAG26	Darkwood Household
0011000001AAG27	Lightwood Household	0011000001AAG27	Lightwood Household
0011000001AAG28	Darkwood Household	0011000001AAG28	Darkwood Household
0011000001AAG29	Lightwood Household	0011000001AAG29	Lightwood Household
0011000001AAG30	Darkwood Household	0011000001AAG30	Darkwood Household
0011000001AAG31	Lightwood Household	0011000001AAG31	Lightwood Household
0011000001AAG32	Darkwood Household	0011000001AAG32	Darkwood Household
0011000001AAG33	Lightwood Household	0011000001AAG33	Lightwood Household
0011000001AAG34	Darkwood Household	0011000001AAG34	Darkwood Household
0011000001AAG35	Lightwood Household	0011000001AAG35	Lightwood Household
0011000001AAG36	Darkwood Household	0011000001AAG36	Darkwood Household
0011000001AAG37	Lightwood Household	0011000001AAG37	Lightwood Household
0011000001AAG38	Darkwood Household	0011000001AAG38	Darkwood Household
0011000001AAG39	Lightwood Household	0011000001AAG39	Lightwood Household
0011000001AAG40	Darkwood Household	0011000001AAG40	Darkwood Household
0011000001AAG41	Lightwood Household	0011000001AAG41	Lightwood Household
0011000001AAG42	Darkwood Household	0011000001AAG42	Darkwood Household
0011000001AAG43	Lightwood Household	0011000001AAG43	Lightwood Household
0011000001AAG44	Darkwood Household	0011000001AAG44	Darkwood Household
0011000001AAG45	Lightwood Household	0011000001AAG45	Lightwood Household
0011000001AAG46	Darkwood Household	0011000001AAG46	Darkwood Household
0011000001AAG47	Lightwood Household	0011000001AAG47	Lightwood Household
0011000001AAG48	Darkwood Household	0011000001AAG48	Darkwood Household
0011000001AAG49	Lightwood Household	0011000001AAG49	Lightwood Household
0011000001AAG50	Darkwood Household	0011000001AAG50	Darkwood Household

So, then, why are the numbers different between Account ID and Account Name?

Notice the Guthrie Household has different Account IDs because there are two different households with the same name. It's best to use an ID when counting unique records when the object's name does not have to be unique.

Creating Formulas in Reports

Now, how about using that Unique Count total in a formula? Let's look at one option to calculate the average amount by Unique Count and Record Count.

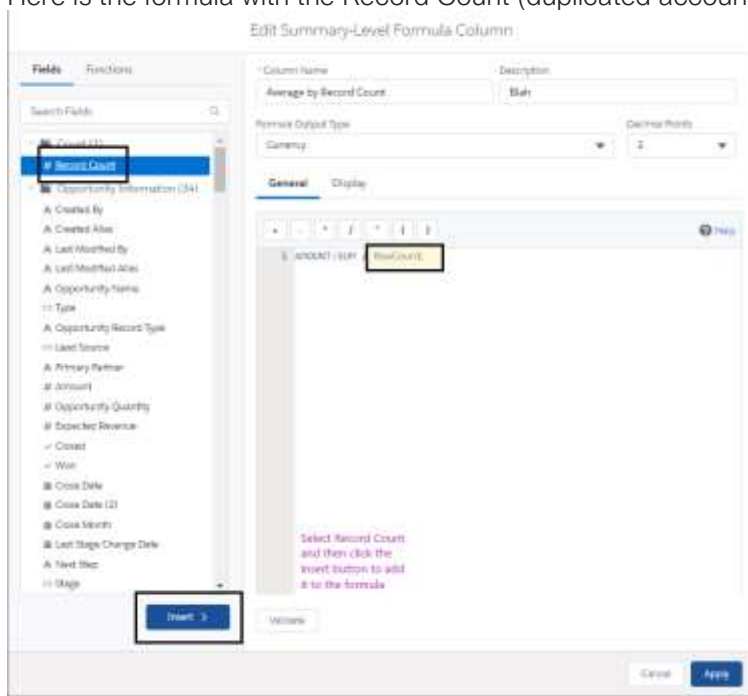
<input type="checkbox"/> Close Date ↑	Sum of Amount	Unique Count of Account ID	Record Count	\sum Average by Unique Count	\sum Average by Record Count
<input type="checkbox"/> FY 2019	\$226,095.00	60	105	Sum of Amount / Unique Count of Account ID \$3,768.25	Sum of Amount / Record Count \$2,153.29
<input type="checkbox"/> FY 2020	\$112,760.00	4	16	\$28,190.00	\$7,047.50
Total	\$338,855.00	61	121		\$2,800.45

We can create a formula and use the unique count of Account ID, basically the number of unique accounts. Additionally, using the record count, the total number of duplicated accounts. The formulas are shown in the above figure.

Here is the Average by Unique Count:

Click the Insert Button to add the field to the formula

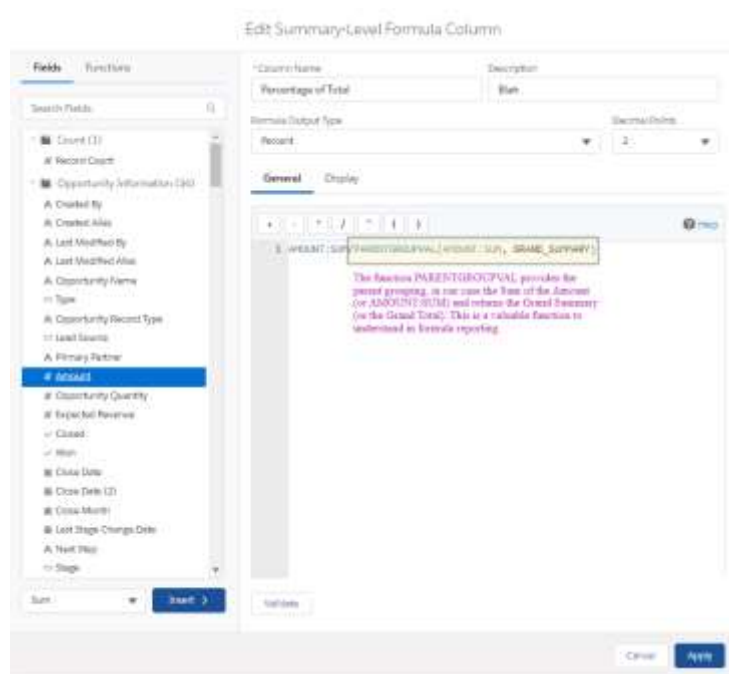
Here is the formula with the Record Count (duplicated accounts):



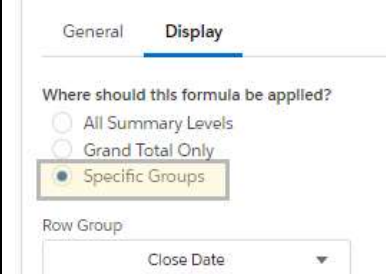
It is also possible to use a grand total amount to calculate each row and the grand total percentage, as shown here. Here we would like to have a percentage of the total amount for each year:

Close Date	Sum of Amount	Percentage of Total
FY2007	2225,975.00	Sum of Amount / Grand Total
FY2008	5112,700.00	53.28%
Total	6318,675.00	Grand Total

Be sure to use the PARENTGROUPVAL function to get the Grand Total.



Then, to display the percentage for each row, click the Display tab and pick Specific Groups. In this case, the Row Group is the Close Date (however, it could be the summary field).



Field to Field Filters

By filtering by fields, it is possible to display information driven by another field. For example, it may be helpful to find Opportunities where the payment amount is less than the amount, showing Opportunities that are not fully paid.

The screenshot shows a reporting tool interface. On the left, there is a 'Filters' panel with several filter criteria: 'Show Me All opportunities', 'Close Date All Time', 'Opportunity Status Any', 'Probability All', and 'Amount greater than Payment Amount Received'. A 'Filter by Amount' dialog box is open, showing the configuration for the selected filter. The dialog has 'Operator' set to 'greater than', 'Type' set to 'Field', and 'Value' set to 'Payment Amount Recel...'. The background shows a table of opportunities with columns for Opportunity Name and Amount.

	Opportunity Name	Am
1	Tammy Abend Donation - \$10 07/31/2020	
2	Tammy Abend Donation - \$10 11/30/2020	
3	Tammy Abend Donation - \$10 12/31/2020	
4	Tammy Abend Donation - \$10 01/31/2021	
5	Tammy Abend Donation - \$10 02/28/2021	
6	Tammy Abend Donation - \$10 03/31/2021	
15	Kristen Yarmouth Donation - \$10 12/31/2014	

By changing Type to Field, we can select a field on the Opportunity. In this case, the Payment Amount Received. This report then provides a list of all the opportunities that are not fully paid. Keep in mind, this could be future payments, too; use the filter on Close Date to show only past Opportunities if you wish to see only those.

Resources

Here is a list of resources to help you with these reporting tips:

- Deduplicate your reports with [unique values](#).
- Learn more about [ParentGroupVal](#) in summary reports.
- [Row level formula](#) reports and [summary formulas](#) can streamline reports.
- [Field to field filters](#) have limitations and only work in lightning.

Celebrate

Reporting can be challenging, and these tips are meant to provide you with a starting point, not the end goal. As always, it is your job to climb the mountain. We'd love to hear how you have used these tips in your organization. It's always fun to celebrate together.