Reporting Tips: Keeping Data Manageable

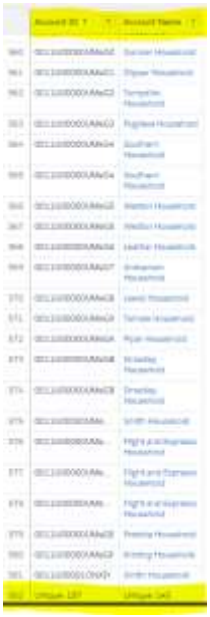
Reports require accurate and hygienic data. Without this, the reports will not reflect the organization's work. Once you ensure your data is clean and ready, how can you best show results in reports? We focus on the following three areas to expand your reporting skills in Salesforce:

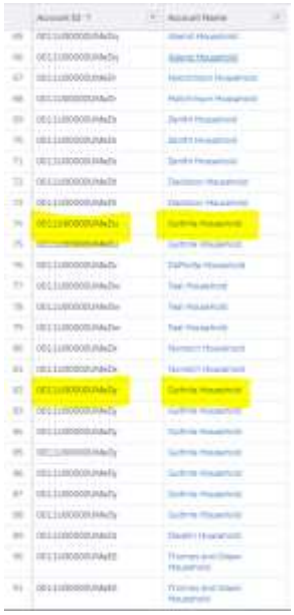
- Unique Count to ensure data is counted once
- Formulas in Reports to calculate information directly in the report
- Field to Field Filters to filter data based on fields in the report

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.





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.

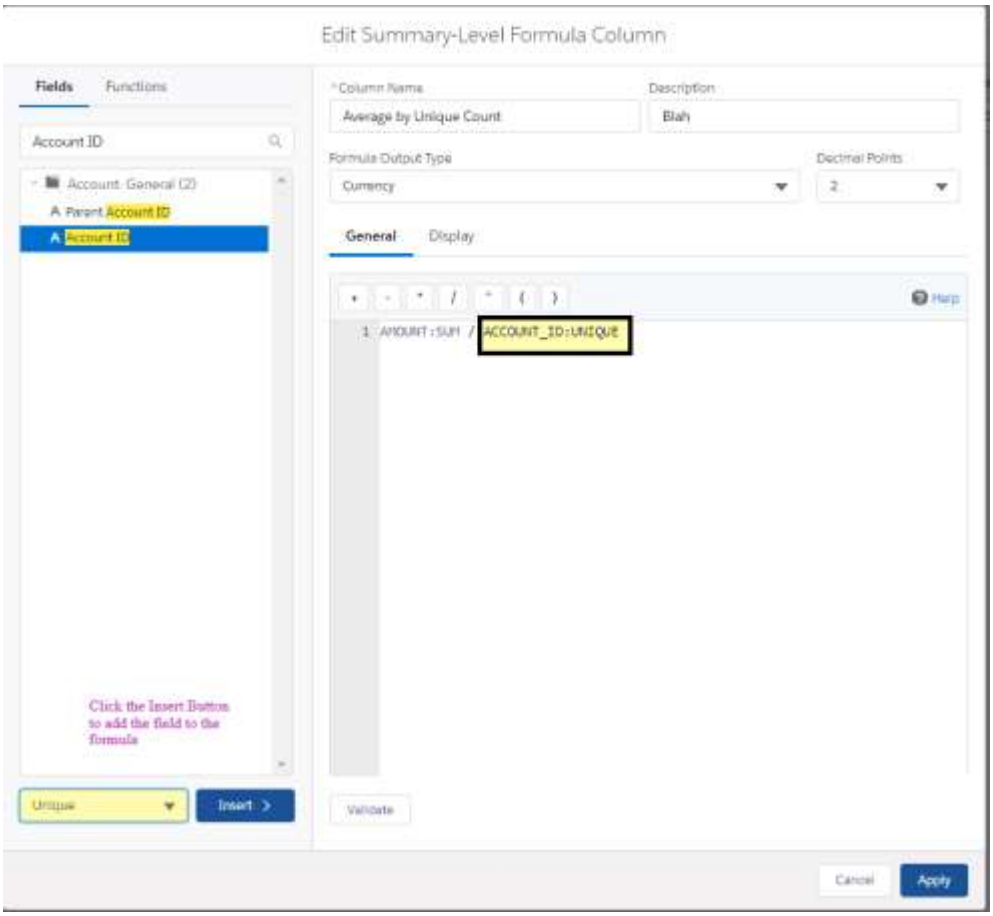
Close Date	Sum of Amount	Unique Count of Account ID	Record Count	fx Average by Unique Count	fx Average by Record Count
FY 2019	$226,095.00	60	105	$3,768.25	$2,153.29
FY 2020	$112,760.00	4	16	$28,190.00	$7,047.50
Total	$338,855.00	61	121		$2,800.45

Sum of Amount / Unique Count of Account ID

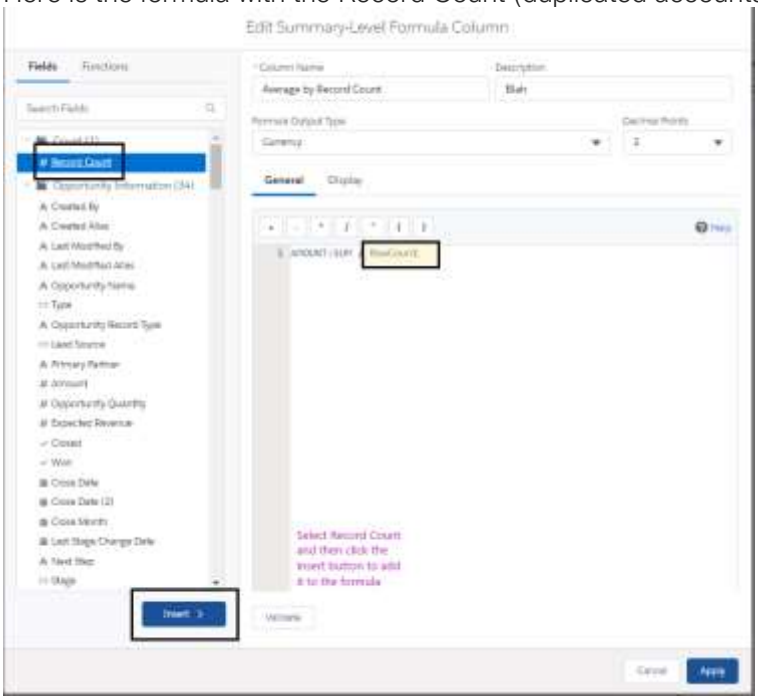
Sum of Amount / Record Count

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.

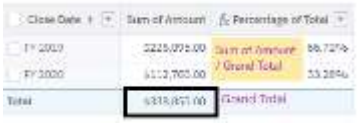
Here is the Average by Unique Count:



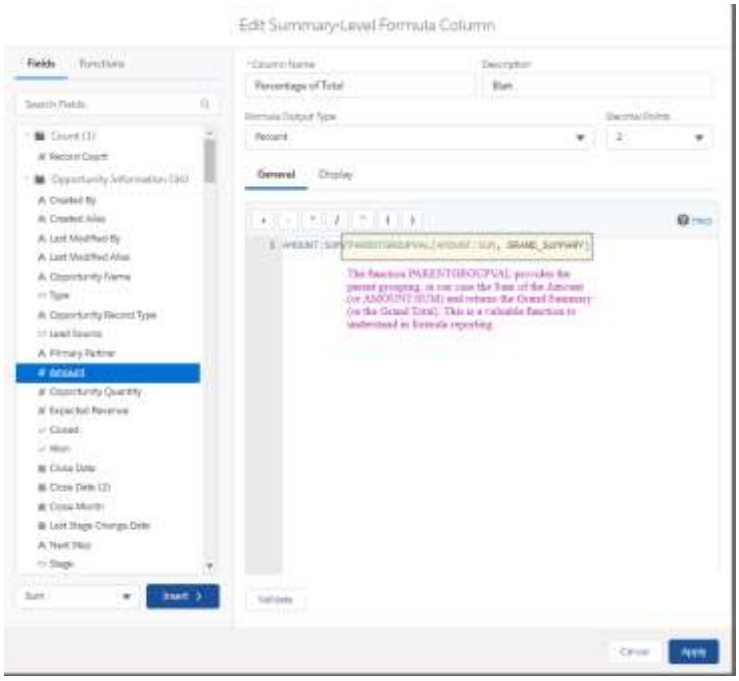
Here is the formula with the Record Count (duplicated accounts):



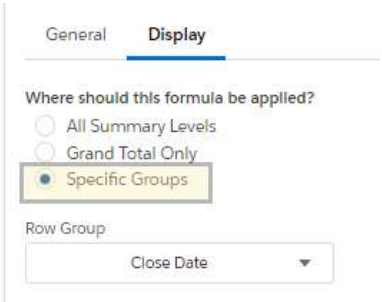
It is also possible to use a grand total amount to calculate each row and the grand total percentage, as shown here. Here we would like to have a percentage of the total amount for each year:



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

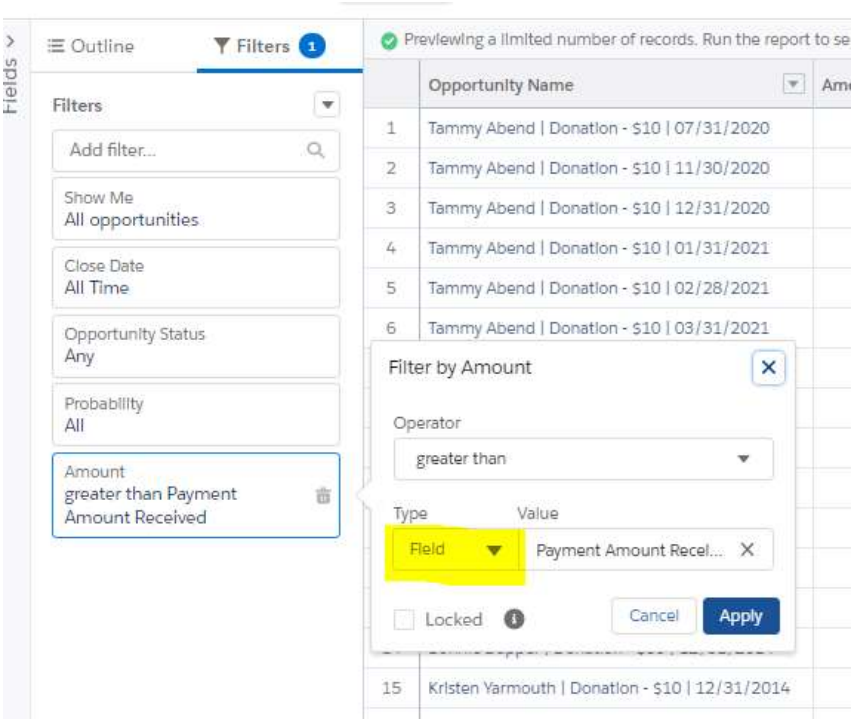


Then, to display the percentage for each row, click the Display tab and pick Specific Groups. In this case, the Row Group is the Close Date (however, it could be the summary field).



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.



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.