Reports and Dashboards

Some tips for reporting and dashboards.
May contain videos, guides, help pages, etc.

- The Ultimate Guide to report Types
- The Reports & Dashboards starting resources
- Date Litterals

The Ultimate Guide to report Types

Understanding how to create data sets in Salesforce is key to creating accurate reports. The data you and your users want to report on is not always stored in records from a single object. Many times you will need to join data together from various objects to create meaningful reports. But with so many ways to join data together, it’s crucial to know when to use each method.

This presentation, given by Evan Ponter, was made available on the Salesforce Videos website: https://www.salesforce.com/video/1770827/

And also associated blog post, and trailheads: https://admin.salesforce.com/ultimate-guide-report-types

The 40-minute video is a nice introduction if you need information about how to build reports, why some data isn't showing up, and how to simplify your user's lives.

The Reports & Dashboards starting resources

Name	Link	Description
Salesforce Reporting Workbook	Click here	This workbook is deprecated and has been for some time. However, if you have no experience at all with reports and dashboards, it shows you the general outline of what is possible and has some nice examples. Don't consider this as the end-all be-all but it can be a nice introduction.
LEX Reports & Dashboard Trailheads	Click here	The trailhead about reports & dashboards. The standard entry point if you haven't done it.
Cross-Filters definition and video	Click here	A quick intro video of how to have a report of companies with or without contacts using Cross Filters. Is a simple solution to an oft-encountered pain point that some people solve with the Power of One.
Power of One	Click here	Some people misuse it where a Cross Filter would work better, but it is still a staple of Salesforce reporting. PoO allows you to count unique occurrences of a record within a grouped record. Better explained in the link.

Date Litterals

When creating a report or a list view, you sometimes need to filter based on a dynamic value. Say you want the records of last week for example. In a report, you could do that with the global filter on top of the reporting engine. But say you want Opportunities closed between the Last month and the Last week ?

Well that's when Date Literals come in.

Literal	What it does
YESTERDAY	Starts at 12:00:00 AM on the day before the current day and continues for 24 hours.
TODAY	Starts at 12:00:00 AM on the current day and continues for 24 hours.
TOMORROW	Starts at 12:00:00 AM. on the day after the current day and continues for 24 hours.
LAST WEEK	Starts at 12:00:00 AM on the first day of the week before the current week and continues for seven days.
THIS WEEK	Starts at 12:00:00 AM on the first day of the current week and continues for seven days.
NEXT WEEK	Starts at 12:00:00 AM on the first day of the week after the current week and continues for seven days.
LAST n WEEKS	Starts at 12:00:00 AM on the first day of the week that started n weeks before the current week, and continues up to 11:59 PM on the last day of the week before the current week.
NEXT n WEEKS	Starts at 12:00:00 AM on the first day of the week after the current week and continues for n times seven days.
n WEEKS AGO	Starts at 12:00:00 AM on the first day of the week that started n weeks before the start of the current week and continues for seven days.
LAST MONTH	Starts at 12:00:00 AM on the first day of the month before the current month and continues for all the days of that month.
THIS MONTH	Starts at 12:00:00 AM on the first day of the current month and continues for all the days of that month.
NEXT n MONTHS	Starts at 12:00:00 AM on the first day of the month after the current month and continues until the end of the nth month.

Literal	What it does
LAST n MONTHS	Starts at 12:00:00 AM on the first day of the month that started n months before the current month and continues up to 11:59 PM on the last day of the month before the current month.
n MONTHS AGO	Starts at 12:00:00 AM on the first day of the month that started n months before the start of the current month and continues for all the days of that month.
NEXT MONTH	Starts at 12:00:00 AM on the first day of the month after the current month and continues for all the days of that month.
LAST 90 DAYS	Starts at 12:00:00 AM 90 days before the current day and continues up to the current second. (The range includes today.)
NEXT 90 DAYS	Starts at 12:00:00 AM on the day after the current day and continues for 90 days. (The range does not include today.)
LAST n DAYS	Starts at 12:00:00 AM n days before the current day and continues up to the current second. (The range includes today. Using this date value includes records from n + 1 days ago up to the current day.)
NEXT n DAYS	Starts at 12:00:00 AM on the next day and continues for the next n days. (The range does not include today.)
n DAYS AGO	Starts at 12:00:00 AM on the day n days before the current day and continues for 24 hours. (The range does not include today.)
LAST QUARTER	Starts at 12:00:00 AM on the first day of the calendar quarter before the current calendar quarter and continues to the end of that quarter.
THIS QUARTER	Starts at 12:00:00 AM on the first day of the current calendar quarter and continues to the end of the quarter.
NEXT QUARTER	Starts at 12:00:00 AM on the first day of the calendar quarter after the current calendar quarter and continues to the end of that quarter.
LAST n QUARTERS	Starts at 12:00:00 AM on the first day of the calendar quarter n quarters ago and continues to the end of the calendar quarter before the current quarter. (The range does not include the current quarter.)
NEXT n QUARTERS	Starts at 12:00:00 AM on the first day of the calendar quarter after the current quarter and continues to the end of the calendar quarter n quarters in the future. (The range does not include the current quarter.)
n QUARTERS AGO	Starts at 12:00:00 AM on the first day of the calendar quarter n quarters before the current calendar quarter and continues to the end of that quarter.

Literal	What it does
LAST YEAR	Starts at 12:00:00 AM on January 1 of the year before the current year and continues through the end of December 31 of that year.
THIS YEAR	Starts at 12:00:00 AM on January 1 of the current year and continues through the end of December 31 of the current year.
NEXT YEAR	Starts at 12:00:00 AM on January 1 of the year after the current year and continues through the end of December 31 of that year.
n YEARS AGO	Starts at 12:00:00 AM on January 1 of the calendar year n years before the current calendar year and continues through the end of December 31 of that year.
LAST n YEARS	Starts at 12:00:00 am on January 1, n+1 years ago. The range ends on December 31 of the year before the current year.
NEXT n YEARS	Starts at 12:00:00 AM on January 1 of the year after the current year and continues through the end of December 31 of the nth year.
LAST FISCAL QUARTER	Starts at 12:00:00 AM on the first day of the fiscal quarter before the current fiscal quarter and continues through the last day of that fiscal quarter. The fiscal quarter is defined on the Fiscal Year page in Setup.
THIS FISCAL QUARTER	Starts at 12:00:00 AM on the first day of the current fiscal quarter and continues through the end of the last day of the current fiscal quarter. The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT FISCAL QUARTER	Starts at 12:00:00 AM on the first day of the fiscal quarter after the current fiscal quarter and continues through the last day of that fiscal quarter. (The range does not include the current quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
LAST n FISCAL QUARTERS	Starts at 12:00:00 AM on the first day of the fiscal quarter n fiscal quarters ago and continues through the end of the last day of the previous fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT n FISCAL QUARTERS	Starts at 12:00:00 AM on the first day of the fiscal quarter after the current fiscal quarter and continues through the end of the last day of the nth fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
n FISCAL QUARTERS AGO	Starts at 12:00:00 AM on the first day of the fiscal quarter n fiscal quarters before the current fiscal quarter and continues through the end of the last day of that fiscal quarter.

Literal	What it does
LAST FISCAL YEAR	Starts at 12:00:00 AM on the first day of the fiscal year before the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
THIS FISCAL YEAR	Starts at 12:00:00 AM on the first day of the current fiscal year and continues through the end of the last day of the fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT FISCAL YEAR	Starts at 12:00:00 AM on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
LAST n FISCAL YEARS	Starts at 12:00:00 AM on the first day of the fiscal year n fiscal years ago and continues through the end of the last day of the fiscal year before the current fiscal year. (The range does not include the current fiscal year.) The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT n FISCAL YEARS	Starts at 12:00:00 AM on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of the nth fiscal year. (The range does not include the current fiscal year.) The fiscal quarter is defined on the Fiscal Year page in Setup.
n FISCAL YEARS AGO	Starts at 12:00:00 AM on the first day of the fiscal year n fiscal years ago and continues through the end of the last day of that fiscal year.