Using the Drag-and-Drop Report Builder

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USING THE DRAG-AND-DROP REPORT BUILDER

Report builder is a powerful visual editor for reports. You can create your entire report from this single interface.

Enabling Report Builder

For existing organizations, report builder is available by default to users with the System Administrator profile. We released an updated version of report builder. With this upgrade:

- All profiles get access to the report builder by default. (You may continue to see the "Report Builder" permission in permission sets and profiles and the PermissionSet and Profile objects in the API, though the upgrade overrides those settings.)
- The old report wizard is available only to users in Accessibility Mode.
- Group and Professional Edition organizations can use report builder.
- You get scatter charts, a new chart type for reports.

New organizations automatically get the latest version of report builder. If you don't see the Report Builder Upgrade section on the User Interface Settings page, the upgrade has already been enabled for your organization.

To enable report builder for all users:

1. From Setup, enter `Reports` in the `Quick Find` box, then select **Reports and Dashboards Settings**.
2. Review the Report Builder Upgrade section of the page and click **Enable**. If you don't see the button, report builder has already been enabled for your entire organization.
3. Confirm your choice by clicking **Yes, Enable Report Builder for All Users**.

> ✏️ Note: Once you upgrade your organization, you no longer see the "Report Builder" permission.

Watch the Video Tutorials

Check out the following videos to learn the basics of using report builder:

- ▶ Getting Started with Report Builder
- ▶ Building Matrix Reports
- ▶ Introducing Joined Reports in Salesforce

What is Report Builder?

The report builder screen lets you work with report fields and filters, and shows you a preview of your report with just some of the data.

Fields Pane (1)

The Fields pane displays fields from the selected report type, organized by folder. Find the fields you want using the Quick Find search box and field type filters, then drag them into the Preview pane to add them to the report.

Create, view, edit, and delete custom summary formulas and bucket fields in the Fields pane as well.

In the joined report format, the Fields pane displays fields from all report types added to the report, organized by report type.

Filters Pane (2)

Set the view, time frame, and custom filters to limit the data shown in the report.

Preview Pane (3)

The dynamic preview makes it easy for you to customize your report. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks. Change the report format and display options, or add a chart.

The preview shows only a limited number of records. Run the report to see all your results.

The Interactive Report Builder Interface
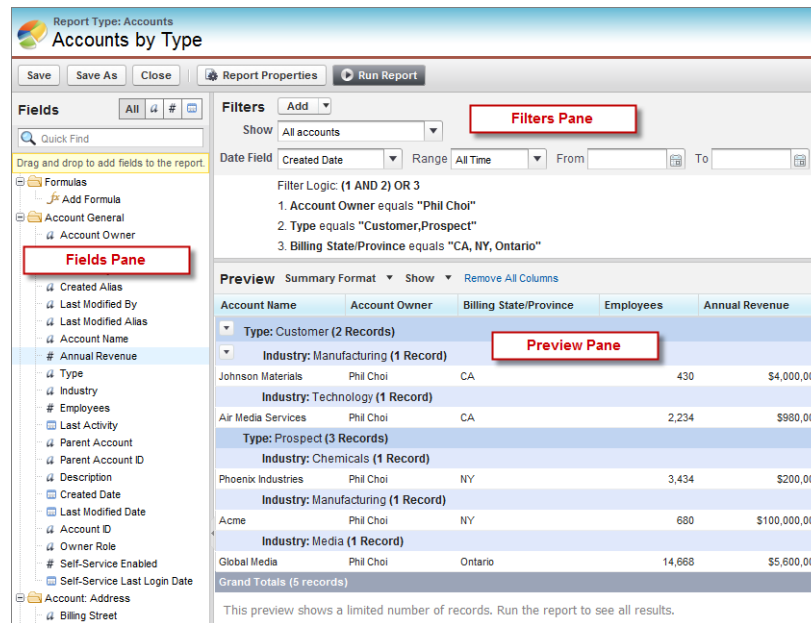
Working with Report Builder

To get started, go to the Reports tab and click **Create New Custom Report**. To customize an existing report using report builder, click the name of a report and click **Customize**. To optimize screen real estate, report builder uses a compressed page header. To view your application tabs, simply close the builder or click the Salesforce logo.

Using the report builder, you can:

- Click **Close** to exit the report builder.
- Save or run the report.
- Click **Report Properties** to change a report's name, description, or folder.
- Find fields using Quick Find and field-type filters.
- Add fields to the report by double-clicking or dragging them into the Preview pane.
- Summarize fields on reports.
- Add and reorder groupings on summary, matrix, and joined reports.
- Add custom summary formulas to summary, matrix, and joined reports.
- Set report filters in the Filters pane.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions except **Database.com**

USER PERMISSIONS

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

- Click the **Format** drop-down to choose between tabular, summary, matrix, or joined report formats.
- Click the **Show** drop-down to toggle the **Details**, **Drop Zones**, and **Record Count** options, and edit **Conditional Highlighting** and **Currencies Using**.
- Click **Add Chart** to define a chart for the report.
- Reorder columns by dragging them.
- Sort the report by a particular column.
- Maximize the Preview pane by resizing or collapsing the Fields and Filters panes.

Working with Filters

Focus your report on the data you're interested in by setting up standard filters, field filters, filter logic, cross filters, and row limits.

Depending on your organization's setup, you may see additional filters, such as probability, hierarchy, territory, and others.

- Use the `Show` drop-down to select your own, your team's, or all records.
- Hover over a filter to edit or remove it.

Working with Fields

The Fields pane displays fields from the selected report type, organized by folder.

Working with Summary Fields

A summary is the `Sum`, `Average`, `Max`, or `Min` for a number field. (Use the `#` filter to find them faster.)

To add a summary field:

- Double-click a number field in the Fields pane.
- Drag a number field into the preview. Press **CTRL** to select multiple fields. For matrix reports, there are drop zones before, between, and after sets of summaries. For example, the sum, average, max, and min of `Annual Revenue` are a set, and you can't drop a new summary field between them.
- Choose **Summarize this Field** in the column menu for a field already in the report.

To change an existing summary field, or add other summaries on that same field, click ▼ next to the summary field and choose **Summarize this Field**.

To remove a summary field:

- Click its menu and choose **Summarize this Field** and deselect all options.
- Click its menu and choose **Remove Summary**.
- Drag the summary set back to the Fields pane. Note that all summaries for that field are removed. Press **CTRL** to select multiple summary fields.

Reorder sets of summary fields in matrix reports by dragging them. The summaries for each field move together when dragged. For example, if your report contains the sum and average of `Annual Revenue`, and the max and min of `Probability`, you can drag the `Probability` summaries before or after the `Annual Revenue` summaries, but not between. Summaries can't be placed after custom summary formulas or `Record Count`.

Working with Groupings

Group data in columns or rows in summary, matrix, and joined reports to display meaningful information. For example, group opportunities by Close Date to see closed opportunities or group cases by product to see the number of cases for each product. You can have groupings inside groupings.

Add a group by dropping a field onto a drop zone.
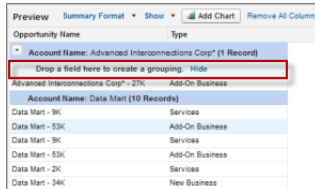
Click **Show** > **Drop Zones** to make them visible. You can also click a column menu for a field in the report and choose **Group by this Field**.

> 💡 Tip: If you group your report by a date field, you can click the group menu, select **Group Dates By**, and specify the grouping time frame: day, week, month, quarter, year, etc.

To remove a group, click the group menu and choose **Remove Group**. You can also grab the group and:

- Drag it to the column bar to remove the group, but keep the field as a column in the report.
- Drag it back to the Fields pane to remove the group and the field from the report.

Drag groups to change their order, or click the group menu and choose **Move Group Up** or **Move Group Down** for column groupings, or **Move Group Left** or **Move Group Right** for row groupings.

Working with Formulas

Formulas let you create custom summaries based on calculated values using report data. These formulas can then be used as columns in your report.

To add a new formula to a summary or matrix report, double-click **Add Formula**. Once you define it and click **OK**, it's automatically added to the preview as a column for summary reports, and a summary field for matrix reports. With joined reports, you can add either a cross-block or a standard custom summary formula. To edit a formula, hover over the name in the Fields pane and click ✏️ .

To remove a formula from the preview, grab its header and drag it back to the Fields pane, or click its menu and choose **Remove Formula**. Press **CTRL** to select multiple formulas. Removing a formula from the preview doesn't delete it. To delete a formula, hover over the name and click 🗑️ , or click **Delete Formula** from the field menu.

Creating Charts

To add or edit a chart:

1. Click **Add Chart** in report builder. For existing charts, click **Edit Chart**.
2. Select a chart type.
3. Enter the appropriate settings on the Chart Data tab for the chart type you selected.
4. Enter the appropriate settings on the Formatting tab.
5. Click **OK**.