



USING CROSS FILTERS IN REPORTS

Summary

Use cross filters to include or exclude records in your report results based on related objects and their fields.

What is a Cross Filter?

You can filter your report results many different ways using the report builder. Field filters limit results by the values of fields in the report. But how do you filter results by related objects? Cross filters work like ordinary filters, but they have some special characteristics of their own.

Add *subfilters* to further filter by fields on the child object. For example, if you have a cross filter of *Accounts with Opportunities*, click **Add Opportunity Filter** and create the *Opportunity Name equals ACME* subfilter to see just those opportunities. You can create up to five subfilters for each cross filter.

To change a report filter, hover over it and click **Edit** or **Remove**. Your filters display when you run your report; click **Edit** on that page to make additional changes.

Considerations

Before you jump in and start using cross filters, review this list of considerations and determine the best next steps for your organization:

- Adding cross filters can potentially slow down your report. To avoid having the report or preview time out, limit the data returned by setting filters. For example, select *My opportunities* for *Show* and *Current FQ* for *Range* instead of viewing all opportunities for all time.
- Since the objects available in cross filters depend on the parent object of the report type you choose, consider the related child objects before selecting a report type. For example, choose the *Accounts* report type to filter on *Accounts with Partners* because *Partner* is a child object of *Account*.
- Cross filters work in conjunction with your report type selection. Cross filters have an AND relationship with the report type you select. Therefore, choosing a report type of *Accounts with Partners* and adding a cross filter for *Accounts without Partners* will yield no results.

Creating Cross Filters

Use cross filters to include or exclude records in your report results based on related objects and their fields.

1. In the Filters pane of report builder, click **Add > Cross Filter**.
2. Select a parent object from the drop-down list. Your choice determines which related objects you see in the child object list.



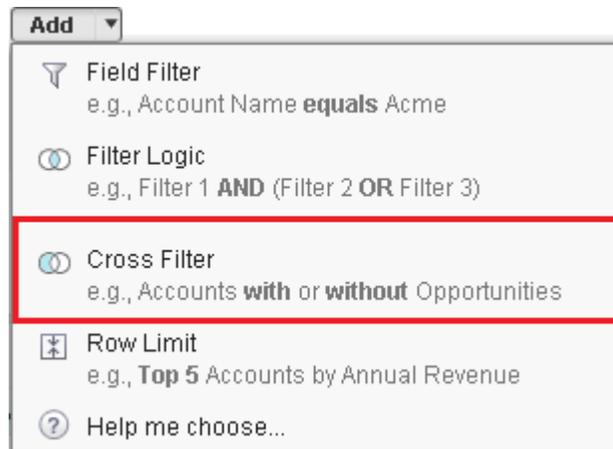
Tip: In report types based on Campaigns, the parent object can be the secondary object in the report type. For example, in a "Campaigns with Leads" report, the parent object can be *Campaigns* or *Leads*.

3. Choose *with* or *without*.

4. Select a child object from the drop-down or search by its name. The drop-down list contains all eligible child objects of your selected parent object.
5. Optionally add subfilters:
 - a. Click **Add Your Related Child Object Filter**.
 - b. Select a field. The fields are determined by the child object in the cross filter. For example, if your cross filter is *Accounts with Cases*, you can use case fields for your subfilter.
 - c. Choose a filter operator.
 - d. Enter a value.
6. Click **OK**.

 **Example:**

The Cross Filter Option in the Add menu



Example: Using WITH in Cross Filters

Let's say a recent campaign in California won you a lot of new customers. You want to ensure that their customer cases get resolved quickly. You can create a report to see which of those accounts currently have cases.

1. Create a new report. For the report type, click **Accounts & Contacts**, select **Accounts**, and click **Create**.
2. In the report builder's Filters pane, set the appropriate standard filters.
3. Create a field filter where *Billing State/Province equals CA* and click **OK**.
4. Click **Add > Cross Filter** and specify *Accounts with Cases*.

When you click **Run Report**, the results will include only California accounts with an associated case.

 Example:

Filtered By: [Edit](#)
[Billing State/Province equals CA](#) [Clear](#)
 AND [Accounts with Cases](#) [Clear](#)

Account Owner	Account Name	Type	Rating	Last Activity	Last Modified Date	Billing State/Province
Admin User	United Partners*	Customer	Warm	1/13/2013	11/15/2011	CA
John Seller	Southern Research Co.	Customer	-	5/5/2012	11/15/2011	CA
Wendy West	Net Inc.	Customer	-	6/12/2012	11/15/2011	CA
Wendy West	Towson Inc.	Prospect	-	8/2/2012	11/15/2011	CA
Mary Seller	Optos Inc.	Customer	-	8/2/2012	11/15/2011	CA
Admin User	Larry Baxter	-	-	7/30/2012	11/15/2011	CA
Wendy West	Morpon Brothers	Customer	Warm	8/2/2012	11/15/2011	CA
Tom Reseller	Valley Supply Inc.	Customer	-	7/31/2012	11/15/2011	CA
Wendy West	Open Source Inc.	Customer	-	8/2/2012	11/15/2011	CA
Admin User	Steam Power Company	Prospect	-	8/2/2012	11/15/2011	CA
Wendy West	General Utilities	Prospect	-	7/31/2012	11/15/2011	CA
Wendy West	Missoula & Sons Inc.	Prospect	-	-	11/15/2011	CA
Grand Totals (12 records)						

Example: Using WITHOUT in Cross Filters

Let's say that you've just imported a list of California accounts and you want to find which ones are missing contacts before you assign owners:

1. Create a new report. For the report type, click **Accounts & Contacts**, select **Accounts**, and click **Create**.
2. In the report builder's Filters pane, set the appropriate standard filters.
3. Create a field filter where *Billing State/Province equals CA* and click **OK**.
4. Click **Add > Cross Filter** and specify *Accounts without Contacts*.

When you click **Run Report**, the results will include only California accounts without an associated contact.

 Example:

Filtered By: [Edit](#)
[Billing State/Province equals CA](#) [Clear](#)
 AND [Accounts without Contacts](#) [Clear](#)

Account Owner	Account Name	Type	Rating	Last Activity	Last Modified Date	Billing State/Province
John Seller	United Partners (Bay Area)	Customer	Warm	-	11/15/2011	CA
Wendy West	AB Partners, Inc.	Partner	-	-	11/15/2011	CA
Grand Totals (2 records)						

Example: Using Multiple Cross Filters

Say you're a salesperson who wants to see which customer accounts have unresolved problem escalations because you want to ensure your support team takes care of them.

1. Create a new report. For the report type, click **Accounts & Contacts**, select **Accounts**, and click **Create**.

2. In the report builder's Filters pane, set the appropriate standard filters.
3. To limit your report to customer accounts, click **Add > Field Filter** and specify *Type equals Customer*.
4. To see which accounts have no activities, click **Add > Cross Filter** and specify *Accounts without Activities*.
5. To see only accounts without completed activities, add a subfilter to your cross filter:
 - a. Click **Add Activities Filter** and specify *Status equals Completed*.
 - b. Click **OK**.
6. To include your accounts that currently have cases, add another cross filter but this time specify *Accounts with Cases*.
7. To exclude cases that were not escalated, add a subfilter to this cross filter:
 - a. Click **Add Cases Filter** and specify *Type equals Problem*.
 - b. Click **Add Cases Filter** again, but this time specify *Status equals Escalated*.
 - c. Click **OK**.

When you run the report, it will include only customer accounts without completed activities with escalated cases.

 **Example:**

Account Owner	Account Name	Type	Rating	Last Activity	Last Modified Date	Billing State/Province
Joe Seller	Acme Resellers	Customer	-	-	11/22/2011	Ca
Grand Totals (1 record)						