



TOP 10 WAYS TO RUN REPORTS FASTER

Summary

Maximizing the performance of your Salesforce reports allows you to spend more time analyzing information and less time running reports.

Do your big reports take a long time to return data?

Here are a few tried and tested ways you can maximize report performance. Bottom line: make sure your report is only looking at the data it needs to look at. For more detailed information, see [Build a New Report](#).

If your reports still take more than 10 minutes to complete after you've tried these tips, it's time to contact Salesforce support.

1. Trim Unneeded Data

Designing your report to get only the data you need is the single best way to get faster reports.

- Select **Hide Details** in Advanced Filters if you only need a summary of the data.
- Exclude unnecessary columns. This is especially effective if you're using a summary or matrix report and have **Show Details** enabled.
- Only query the objects that make sense for this report. For example, a report that includes accounts and contacts may process twice as much data as a report that includes only accounts. (Custom fields on an object count as a separate object in this context.)
- Whenever you can, choose the "My..." or "My Team's..." options rather than "All" — for example, "My Leads."

2. Narrow Your Filters

Selective filters generally work faster than more general ones, all else being equal. Try to make your filters as selective as you can.

- Use the `equals` or `not equal to` operators instead of `contains` or `does not contain`. For example, use `Account Owner equals John James`, not `Account Owner contains John`.
- Choose **AND** rather than **OR** for filter logic.

See [Enter Filter Criteria](#).

3. Focus on the Right Time Period

Queries with fixed time frames run faster than open-ended queries.

- Always use the starting and ending date values to limit the report scope.
- Try using relative date values such as `THIS WEEK`, `NEXT MONTH`, or `TOMORROW`. This works well for saved reports for a specific, but relative time period—for example, Last Month's Leads.
- Especially for activity reports, use an ending date to eliminate future recurring activities.

Video

For quick tips, tell your users to search for [Making Your Reports Run Faster](#) at help.salesforce.com.

Use Dashboards

- Create dashboards out of custom reports.
- Save standard reports to a report folder to use in a dashboard.
- Schedule reports and dashboards to be sent via email.

Optimized Fields

For more detail about search-optimized fields, see the [Search Optimization Cheat Sheet](#). For information on the `External ID` field, see [Custom Field Attributes](#).

Move Folders Around

You can organize the folders on the Reports tab by clicking **Reorder Folders**.

4. Consider the Scale of Your Objects

Do you know how many records exist for each object your report queries? The more records, the bigger the object's storage size and the longer the report takes to run. To determine the size of an object, from Setup, enter `Storage Usage` in the `Quick Find` box, then select **Storage Usage** and see each object's `Storage` value in the Current Data Storage Usage section.

5. Empty Your Recycle Bin

Data you've deleted still gets queried when you run a report, unless you've permanently removed it by emptying the recycle bin. If you've been actively pruning your data, that's great, but your users won't get the full benefit until you clear the recycle bin.

6. Filter on Fields That Are Optimized for Search

Some standard fields are optimized for search: `Id`, `Name`, `OwnerId`, `CreatedDate`, `SystemModStamp`, `RecordType`. Master-detail fields and lookup fields are also optimized for search. Custom fields are optimized for search if `External ID` is selected for the field.

7. Don't Keep Clicking

- Clicking **Run Report** multiple times increases the time to display the report.
- Each time you click **Run Report**, the report runs to completion, even if you click **Stop**.
- If your report takes longer than 10 minutes to complete, Salesforce cancels the report. Once the report stops running, try running it again. Some of the data is cached in memory, so a second run may succeed.

8. Share Dashboards Instead of Reports

A dashboard refreshes data for everyone who has access to it whenever anyone clicks **Refresh**. If you have a report that takes a long time to run, put it in a dashboard and direct users to that rather than the report. You'll have more people seeing fresh data with fewer report runs.

Encourage users with the "Schedule Dashboards" permission to have their dashboards refresh daily, weekly, or monthly, so that users don't always have to wait for data to refresh.

9. Make Your Reports Easy to Find

If you're an administrator, you can change the folders users see on the Reports tab.

- Organize public custom reports into sections to help users locate important reports.
- Make report folders available or hidden to different groups of users.

10 Try a Reporting Snapshot

Reporting snapshots let you store point-in-time data on reports. You map fields from a tabular or summary custom report to the fields on a custom object, and schedule when to run the report to load the custom object's fields with the report's data. You'll need the "Manage Analytic Snapshots" permission to do this.

Reporting snapshots allow you to:

- Build histories of report data from which you can spot trends via reports.
- Work with report data similarly to how you work with other records in Salesforce.

From Setup, enter *Reporting Snapshots* in the *Quick Find* box, then select **Reporting Snapshots** to display the Reporting Snapshots page, from which you can create, update, and view all the reporting snapshots in your organization.

See [Prepare Reporting Snapshots](#).