



MAXIMIZING REPORT PERFORMANCE

Abstract

Salesforce reports provide an excellent tool to help you monitor and analyze your business. These suggestions can help you maximize the performance of your reports, allowing you to spend more time on your analysis and less time running reports.

Use the tips given in this document to maximize report performance. If your reports still take more than 10 minutes to complete after trying all the tips given here, contact Salesforce support.

For more information on report builder, see [Using the Drag-and-Drop Report Builder](#). For information on other analytics features, see [Getting Started with Analytics](#).

Watch this video for quick tips on  [Making Your Reports Run Faster](#).

Decreasing Download Time

To decrease the time it takes your browser to display your report, you can:

- Exclude unnecessary columns. This is especially important if you are using a summary or matrix report and have **Show Details** enabled. This is the number one tip to make your reports faster!
- Hide details. Check the `Hide Details` box in Advanced Filters if you only need a summary of the data.

Enhancing Report Speed

The following factors affect report speed:

- The number of records that exist for each object the 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, click **Data Management > Storage Usage** and see each object’s `Storage` value in the Current Data Storage Usage section.
- The selectivity of the report’s most-selective filter and whether the filter is on a field optimized for search:
 - ◇ Make the most-selective filter as selective and efficient as possible.
 - ◇ When possible, filter on fields that are optimized for search. Not all standard fields are optimized for search. If necessary, call Customer Support to determine which standard fields are optimized. Custom fields are optimized for search if `External ID` is selected for the field. For information on the `External ID` field, see “Custom Field Attributes” in the Salesforce online help.
- The number of objects in the report. For example, if the report includes accounts and contacts, it may process twice as much data as a report that includes only accounts. Note that custom fields on an object count as a separate object in this context.

Report Timeouts

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.

Optimizing Filters

Rerunning Reports

- Each time you click **Run Report**, the report runs to completion, even if you click **Stop**.
- Clicking **Run Report** multiple times increases the time to display the report.

When using field filters to customize a report, try these tips for faster performance:

- When filtering, 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
- Use time frame filters to narrow your report's date range. For example, use `Last 30 Days` instead of `Current FY`.
- Set time frame filters by choosing a `Date Field` and `Range` to view. Only records for that time frame are shown.
- Reduce the number of fields in the report by removing unnecessary columns or fields.
- If you receive an error message that your activity report has too many results, customize the report to include a filter on a picklist, text, or date field. Alternatively, rerun the report using a different activity data type such as "Activities with Accounts" or "Activities with Opportunities".
- Add time filters, scope filters, and filter criteria to the report to further narrow the results.

For more information, see "Enter Filter Criteria" in the Salesforce online help.

Scoping Reports

Using Relative Dates

- 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`.

Scope your reports to create faster reports with more relevant information.

- Always use the starting and ending date values to limit the report scope.
- Especially for activity reports, use an ending date to eliminate future recurring activities and speed up your report.
- In the `View or Relationship to Opportunity` drop-down list in the wizard or at the top of a report, choose the "My..." or "My Team's..." options rather than "All"—for example, "My Leads".

Using Dashboards to Display Report Data

Use reports as the basis for dashboards and make them available to your users. Dashboards refresh for every user that has access to it when one user clicks **Refresh**.

- ### Using 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.

- Add commonly used reports to dashboards.
- If you have reports that take a long time to run, use them in a dashboard.
- Users with the "Schedule Dashboards" permission in Enterprise, Unlimited, and Performance Editions can schedule dashboards to refresh daily, weekly, or monthly so that users do not have to wait for data to refresh.

Organizing Your Reports

Moving Report Folders

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

Administrators in Professional, Unlimited, Performance, Enterprise, and Developer Edition organizations can change the folders displayed 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.

Store Report Data with Analytic Snapshots

Managing Snapshots

From Setup, click **Data Management > Analytic Snapshots** to display the Analytic Snapshots page, from which you can create, update, and view all the analytic snapshots in your organization.

In Professional, Unlimited, Performance, Enterprise, and Developer Editions, users with the “Manage Analytic Snapshots” permission can create analytic snapshots to store point-in-time data on reports. With analytic snapshots, 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. Analytic 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.

Terminology

- **Source Report**—The custom report scheduled to run and load data as records into a custom object.
- **Target object**—The custom object that receives the results of the source report as records.
- **Running user**—The user whose security settings determine the source report's level of access to data.

Setting Up Analytic Snapshots

Use the steps below to set up an analytic snapshot. For more information on each step, see “Prepare Analytic Snapshots” in the Salesforce online help.

1. Create a new custom report that includes the fields you want to load as records into a target object.
2. Create a new custom object in which to store the records loaded from the source report.
3. Create fields on the target object that will receive the source report's results when the analytic snapshot runs.