MAXIMIZING REPORT PERFORMANCE

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.
### Optimizing Filters

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

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.

- 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

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

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.

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.

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.