USING JOINED REPORTS

Summary

Use the joined report format to create multiple views of the data contained in a single report. You can add multiple report types to a joined report, create standard and cross-block custom summary formulas, add a chart, and more.

What Are Joined Reports?

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"
To run reports:	"Run Reports"

Joined reports let you view different types of information in a single report, so you create one report when, previously, you created several. For example, with joined reports you can create a report comparing the number of support cases that are new, closed, or in-progress by priority. Similarly, you can use joined reports to create a report containing each of your organization's deals, and the sales team members and products associated with each deal.

A joined report consists of up to five report *blocks*, which you add to the report to create multiple views of your data. For each block, you can add regular and summary fields, create standard and cross-block custom summary formulas, apply filters, and sort columns. You apply groupings across all blocks in the report, and can add up to three groupings to the blocks, the same as for the summary format. You can also add a chart to a joined report.

A joined report can contain data from multiple standard or custom report types. You can add report types to a joined report if they have relationships with the same object or objects. For example, if you have a joined report that contains the Opportunities report type, you can add the Cases report type as well because both have a relationship with the Accounts object.

Considerations

- For users to be able to create and edit joined reports, report builder must be enabled for your entire organization. For information on enabling report builder, see Upgrade the Report Wizard. When report builder isn't enabled, users can only run joined reports.
- Joined reports require that the new user interface theme is enabled. Users without the new theme are unable to create, edit, or run joined reports.
- Internet Explorer 6 is not supported for joined reports.
- You can't filter data on a joined report in dashboard view or add a filter to a dashboard that only has joined reports.

Last updated: April 28, 2016

What Can I Do with Joined Reports?

Most of the things you can do in summary or matrix reports you can also do with joined reports. For example, you can find, add, and remove fields; summarize fields; add custom summary fields; and run and save reports. See "Build a New Report" in the Salesforce Help.

Additionally, when working with a joined report, you can:

- Add up to 16 report types to the report.
- Add additional blocks to the report. You can add up to 5 blocks to a report.
- Add cross-block and standard custom summary formulas to each block.
- Add a chart.
- Filter individual blocks using standard and Boolean filters.
- Sort columns for each block, hide or show details across blocks, and hide or show record counts in individual blocks.
- Run the report.

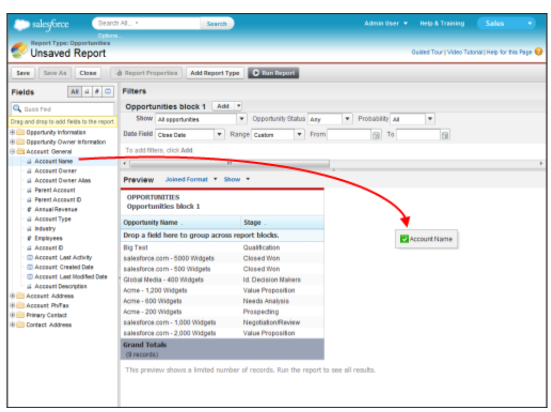
Here are some things you can't do with joined reports.

- Add bucketed fields.
- Add cross filters.
- Drag and drop filters from the Fields pane on to the Filter pane.
- Apply conditional highlighting.
- Change the hierarchy for opportunity or activity reports.
- Create reporting snapshots based on joined reports.

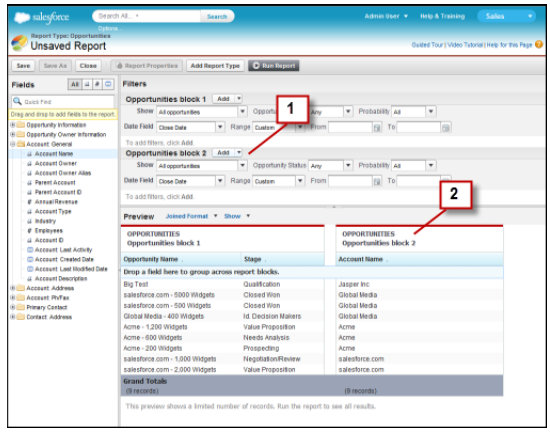
Adding Blocks to Joined Reports

Adding blocks to joined reports lets you create multiple views of the data included in a single report.

1. Select a field from the Fields pane and drag it to the empty area of the Preview pane.



2. Drop the field to create the block.



When you've added the block, notice that standard and field filters for the additional block are added to the Filters pane (1). Also, the new block appears in the Preview pane (2). Optionally, you can rename the block by clicking the block name and entering a new name.

A block is also added to a joined report when you add a new report type to a report. See Adding Blocks to Joined Reports on page 2.

Adding Report Types to a Joined Report

Adding an additional report type lets you expand the set of data available for analysis in a joined report.

1. Select `Joined` from the report format menu.
2. Click **Add Report Type**.

   The Add an Additional Report Type overlay appears and displays the report types that you can add to the existing report.

3. Select the report type.

   The overlay displays identifies the objects that are common to the selected report type and the types already included in the report.

4. Click **OK**.

The additional report type is added. Notice that:

- A new block appears in the report.
- The Fields pane updates with a new area that contains fields unique to the report type. Fields common to all report types are in the Common Fields area.

Adding Custom Summary Formulas to Joined Reports

Two types of custom summary formulas are available with joined reports: standard and cross-block.

Standard custom summary formulas apply to one report type, and can be added to blocks that are based on that report type only. For example, a summary formula created for the Cases report type can only be applied to Cases blocks. Custom summary formulas in joined reports support the same data formats, formula options, functions, and calculation display locations as they do with summary and matrix reports.

Cross-block custom summary formulas let you calculate values across multiple blocks in a joined report. For example, you can use a cross-block formula to calculate the ratio of open to closed opportunities for an account or the ratio of closed pipeline deals to sales targets.

To add a custom summary formula:

1. Use one of these options to access the Add Summary Formula overlay from the Fields pane.

Option	Description
To create a standard custom summary formula	Go to the report type category, and double-click **Add Formula**
To create a cross-block custom summary formula	Go to the Common category and double-click **Add Cross Block Formula**

2. Enter a name for the formula as you want it to appear in the report, and optionally a description.

   The name must be unique.

3. From the `Format` drop-down list, select the appropriate data type for your formula based on the output of your calculation.
4. From the `Decimal Places` drop-down, select the number of decimal places to display for currency, number, or percent data types. This setting is ignored for currency fields in multicurrency organizations. Instead, the `Decimal Places` for your currency setting apply.
5. Set the `Where will this formula be displayed?` option.

   The calculated value displays in the report block at either the Grand Total or the global grouping level, depending on which you select. To display the formula calculation at every level, including the Grand Total, select `All summary levels`. Optionally you can select to show the calculation at a global grouping level. You can have three global groupings in a joined report. The groupings apply across all blocks.

6. Build your formula:
   a. Select one of the fields listed in the **Summary Fields** drop-down list. This field's value is used in your formula.

      When creating a cross-block formula, the fields are grouped by block. You can also use Quick Find to search for a field.

      When creating a single-report type formula, the list displays numeric fields available for the report type.

   b. Select the kind of summary type to use in your formula. This option is not available for `Record Count`.

Summary Type	Description
Sum	The summary value of data in a field or grouping of fields.
Largest Value	The largest value of data in a field or grouping of fields.

Summary Type	Description
Smallest Value	The smallest value of data in a field or grouping of fields.
Average	The average of data in a field or grouping of fields.

c. Click **Operators** to add operators to your formula.

d. Select the function category (All, Logical, Math, or Summary), choose the function you want to use in your formula, and click **Insert**.

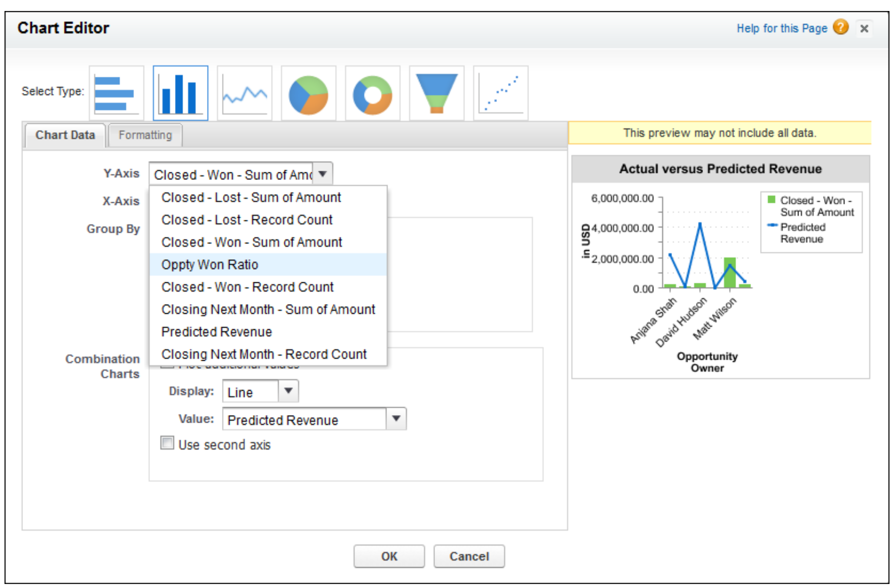
e. Repeat these steps as necessary.

7. Click **Check Syntax** to see if your formula contains errors. Errors are highlighted by the cursor.
8. Click **OK**. Your formula isn't saved until you save the report.

Adding Charts to Joined Reports

All chart types available for summary and matrix reports are available for joined reports as well. Your chart can display data based on standard as well as cross-block custom summary formulas, summary fields, record counts, and fields you've used to group blocks.

In the Chart Editor, summary field names contain both the field name and the block name. For example, in the figure, `Closed — Lost — Sum of Amount` is the summarized Amount field from the Closed — Lost block. A cross-block or standard custom summary formula contains the block name when the formula is included in multiple blocks.



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**.

Running Joined Reports

Joined reports run on a different page than other reports. From the joined reports run page, you can:

- Click **Run Report** to run the report.
- Click **Show Details** to view all data or **Hide Details** to show only summary information.
- Click **Customize** to edit the report in report builder.
- Click **Save** to save the report, or click **Delete** to delete it.
- Click **Report Properties** to change the report's name, description, or folder.
- View the report generation status.

Creating a Sales Rep Scorecard

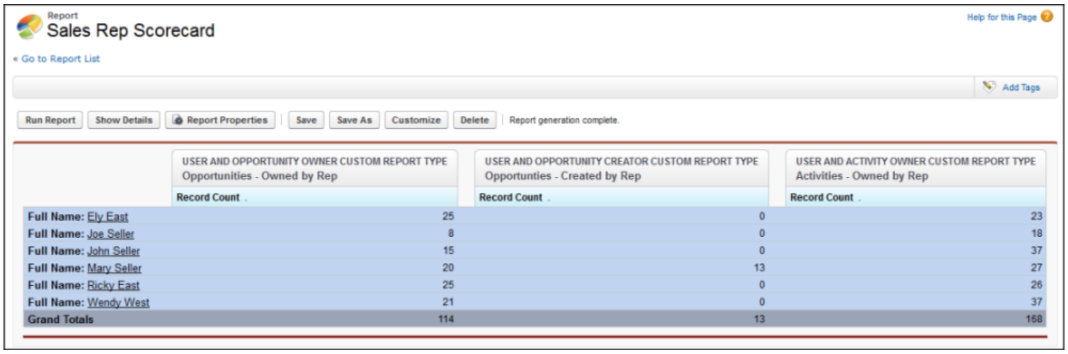
A sales rep scorecard lets your sales management team understand the performance and actions of your organization's sales reps. To create it, you need to have three separate custom report types, each of which creates a relationship between User (as the primary object) and one of the following three objects: Opportunity Owner, Opportunity Creator, and Activity Owner. Note that, in this example, we've named the custom report types `User and Opportunity Owner Custom Report`, `User and Opportunity Creator Custom Report`, and `User and Activity Owner Custom Report`.

Start by creating a new custom report based on the User and Opportunity Owner custom report type, and then add the User and Opportunity Creator and User and Activity owner custom report types as two additional blocks. Then, group by Sales Rep (opportunity owner) and set the filters as described in the procedure.

To create the report:

1. Create a new report, selecting `User and Opportunity Owner Custom Report` as the report type.
2. Select `Joined` from the **Format** drop-down.
3. Click **Add Report Type**.
4. Select `User and Opportunity Creator Custom Report`.
5. Click **Add Report Type** again, and choose `User and Activity Owner Custom Report`.
6. Group the blocks by `Full Name`.
7. Add additional fields and filters to the report as needed. For example, you might want to change the date filters to focus on rep performance during a particular time frame. Or, to make sure that only sales people are included as opportunity owners, create a filter on the `Role: Name` filter limit your results to users with "Sales" in their roles.
8. Optionally, provide names for the blocks.

9. Click **Save** or **Run Report**.

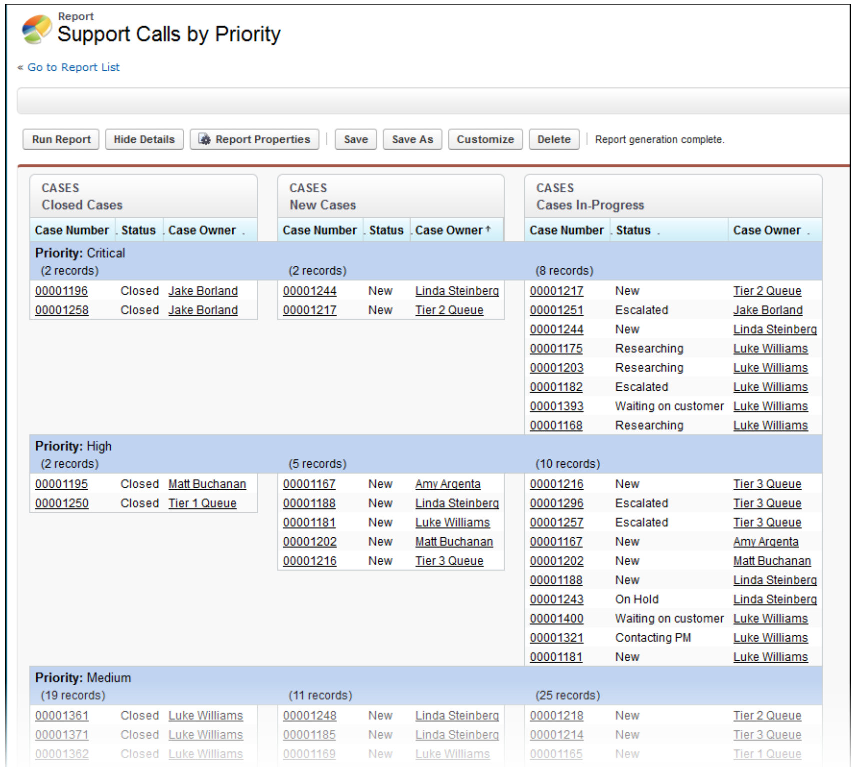


Reviewing Support Cases by Status and Priority

You can also create a report comparing the number of new, closed, or in-progress support cases by priority. The report contains a single standard report type: Cases. First, create the report, add three blocks to the report, filter each block by the appropriate status, and then use the `Priority` field for grouping.

To create the report:

1. Create a new report, selecting `Cases` as the report type.
2. Select `Joined` from the **Format** drop-down.
3. Remove unwanted fields by dragging them to the Fields pane.
4. Create three blocks, each containing the `Case Number` and `Status` and, optionally, `Case Owner` fields.
5. For each block, filter on all cases. Then, filter each of the blocks by `Status` as follows:
   - Block 1: *`Status equals Closed`*
   - Block 2: *`Status equals New`*
   - Block 3: *`Status not equal to Closed, New, Closed in Portal, Closed — First Call`*
6. Group the blocks by `Priority`.
7. Optionally, rename the blocks.
8. Click **Save** or **Run Report**.



CASES Closed Cases			CASES New Cases			CASES Cases In-Progress		
Case Number	Status	Case Owner	Case Number	Status	Case Owner	Case Number	Status	Case Owner
Priority: Critical (2 records)			(2 records)			(8 records)		
00001196	Closed	Jake Borland	00001244	New	Linda Steinberg	00001217	New	Tier 2 Queue
00001258	Closed	Jake Borland	00001217	New	Tier 2 Queue	00001251	Escalated	Jake Borland
						00001244	New	Linda Steinberg
						00001175	Researching	Luke Williams
						00001203	Researching	Luke Williams
						00001182	Escalated	Luke Williams
						00001393	Waiting on customer	Luke Williams
						00001168	Researching	Luke Williams
Priority: High (2 records)			(5 records)			(10 records)		
00001195	Closed	Matt Buchanan	00001167	New	Amy Argenta	00001216	New	Tier 3 Queue
00001250	Closed	Tier 1 Queue	00001188	New	Linda Steinberg	00001296	Escalated	Tier 3 Queue
			00001181	New	Luke Williams	00001257	Escalated	Tier 3 Queue
			00001202	New	Matt Buchanan	00001167	New	Amy Argenta
			00001216	New	Tier 3 Queue	00001202	New	Matt Buchanan
						00001188	New	Linda Steinberg
						00001243	On Hold	Linda Steinberg
						00001400	Waiting on customer	Luke Williams
						00001321	Contacting PM	Luke Williams
						00001181	New	Luke Williams
Priority: Medium (19 records)			(11 records)			(25 records)		
00001361	Closed	Luke Williams	00001248	New	Linda Steinberg	00001218	New	Tier 2 Queue
00001371	Closed	Luke Williams	00001185	New	Linda Steinberg	00001214	New	Tier 3 Queue
00001362	Closed	Luke Williams	00001169	New	Luke Williams	00001165	New	Tier 1 Queue

Predicting Opportunity Revenue

Using cross-block custom summary formulas, you can create a report that predicts future opportunity revenue based on your sales reps' past performance. Create a report based on the Opportunities standard report type, add three blocks to the report, filter each block by the appropriate status, and then create a formula that uses fields from different blocks.

To create the report:

1. Create a new joined report, selecting `Opportunities` as the report type.
2. Remove unwanted fields by dragging them to the Fields pane.
3. Create three blocks, each containing the `Opportunity Name`, `Account Name` and `Amount` fields.
4. For each block, show `All Opportunities`. Then, filter each block.

Block	Filters
Block 1	*Opportunity Status equals Closed* *Date Field equals Close Date* *Range equals Current and Previous FY* *Stage equals Closed Lost*
Block 2	*Opportunity Status equals Closed Won* *Date Field equals Close Date*

Block	Filters
	`Range equals Current and Previous FY`

Block 3	`Date Field equals Close Date`
	`Range equals Next Month`
	`Opportunity Status equals Open`

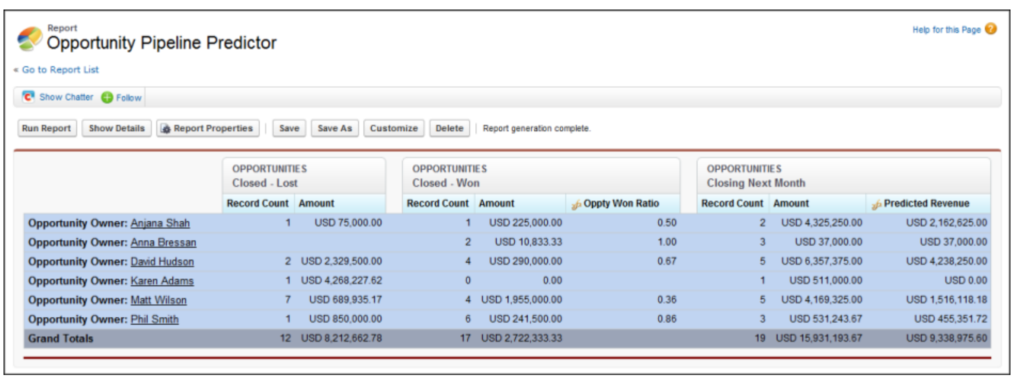
5. Group the blocks by `Opportunity Owner`.
6. Rename the blocks. For example, "Closed — Won", "Close — Lost", and "Closing Next Month".
7. Create a cross-block custom summary formula that predicts upcoming revenue based on past sales rep performance:

```
[Closing Next Month]AMOUNT:SUM*([Closed - Won]RowCount/([Closed -
                                                    Lost]RowCount+[Closed -
Won]RowCount))
```

8. Add the formula to one or more of the blocks.
9. Optionally, add a cross-block custom summary formula that calculates the win ratio of each sales rep:

```
[Closed - Won]RowCount/([Closed - Lost]RowCount+[Closed -
Won]RowCount)
```

10. Click **Save** or **Run Report**.



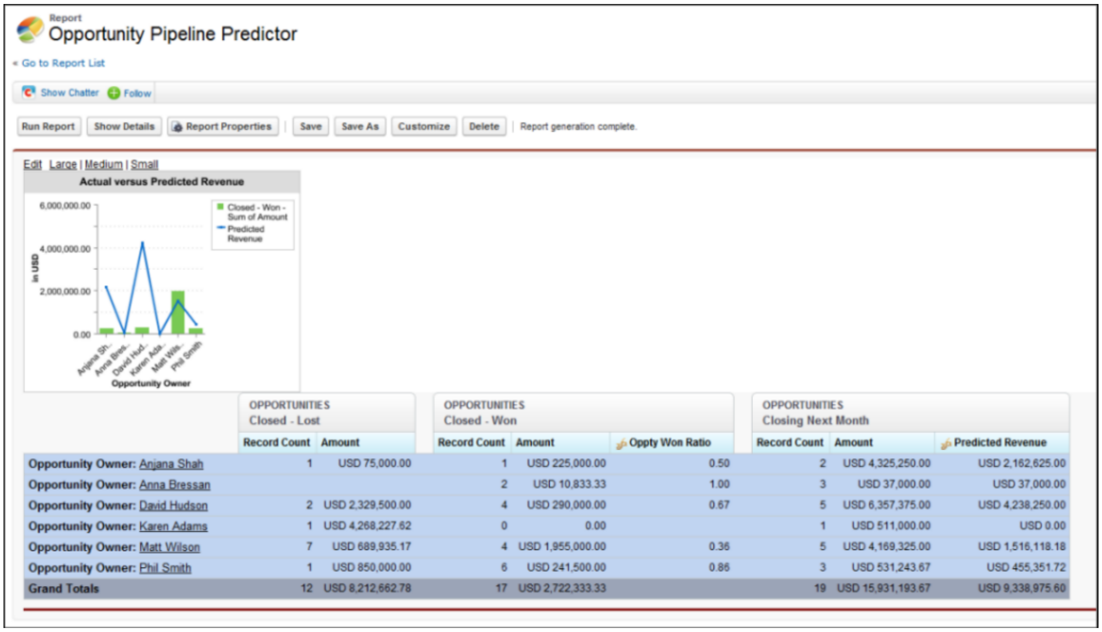
	OPPORTUNITIES Closed - Lost		OPPORTUNITIES Closed - Won			OPPORTUNITIES Closing Next Month		
	Record Count	Amount	Record Count	Amount	Oppty Won Ratio	Record Count	Amount	Predicted Revenue
Opportunity Owner: Anjana Shah	1	USD 75,000.00	1	USD 225,000.00	0.50	2	USD 4,325,250.00	USD 2,162,625.00
Opportunity Owner: Anna Bressan			2	USD 10,833.33	1.00	3	USD 37,000.00	USD 37,000.00
Opportunity Owner: David Hudson	2	USD 2,329,500.00	4	USD 290,000.00	0.67	5	USD 6,357,375.00	USD 4,238,250.00
Opportunity Owner: Karen Adams	1	USD 4,268,227.62	0	0.00		1	USD 511,000.00	USD 0.00
Opportunity Owner: Matt Wilson	7	USD 689,935.17	4	USD 1,955,000.00	0.36	5	USD 4,169,325.00	USD 1,516,118.18
Opportunity Owner: Phil Smith	1	USD 850,000.00	6	USD 241,500.00	0.86	3	USD 531,243.67	USD 455,351.72
Grand Totals	12	USD 8,212,662.78	17	USD 2,722,333.33		19	USD 15,931,193.67	USD 9,338,975.60

You can include a chart with a joined report to provide a visual representation of the data. For example, you can add a chart to the Opportunity Pipeline Predictor report that shows actual versus predicted revenue.

To add the chart:

1. Create the Predicting Opportunity Pipeline report.
2. Click **Add Chart**.
3. For the Y-axis, select `Closed — Won — Sum of Amount`.
4. Select **Plot additional values**.
5. Select `Line` for the Display option, and `Predicted Revenue` as the Value.

6. Click the Formatting tab, and enter `Actual versus Predicted Revenue` as the chart title.
7. Click **OK**.
8. Click **Save** or **Run Report**.



	OPPORTUNITIES Closed - Lost		OPPORTUNITIES Closed - Won			OPPORTUNITIES Closing Next Month		
	Record Count	Amount	Record Count	Amount	Oppty Won Ratio	Record Count	Amount	Predicted Revenue
Opportunity Owner: Anjana Shah	1	USD 75,000.00	1	USD 225,000.00	0.50	2	USD 4,325,250.00	USD 2,162,625.00
Opportunity Owner: Anna Bressan			2	USD 10,833.33	1.00	3	USD 37,000.00	USD 37,000.00
Opportunity Owner: David Hudson	2	USD 2,329,500.00	4	USD 290,000.00	0.67	5	USD 6,357,375.00	USD 4,238,250.00
Opportunity Owner: Karen Adams	1	USD 4,268,227.62	0	0.00		1	USD 511,000.00	USD 0.00
Opportunity Owner: Matt Wilson	7	USD 689,935.17	4	USD 1,955,000.00	0.36	5	USD 4,169,325.00	USD 1,516,118.18
Opportunity Owner: Phil Smith	1	USD 850,000.00	6	USD 241,500.00	0.86	3	USD 531,243.67	USD 455,351.72
Grand Totals	12	USD 8,212,662.78	17	USD 2,722,333.33		19	USD 15,931,193.67	USD 9,338,975.60