



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.

Filter Across Objects with Cross Filters

Use a cross filter to fine-tune your results by including or excluding records from related objects and their fields, without having to write formulas or code. You can apply cross filters by themselves, or in combination with field filters.

▶ Watch a video:

- [▶ How to Use Cross Filters \(Lightning Experience\)](#)
- [▶ Using Cross Filters in Reports \(Salesforce Classic\)](#)

The screenshot shows the Salesforce Reports interface. The report title is "Accounts with Escalated Cases" and the data source is "ACCOUNTS". The report is displayed in a table format with columns: Account Owner, Account Name, Billing State/Province, Billing City, Type, and Industry. The table contains 5 rows of data. A "Filters" panel is open on the left, showing "Add Cross Filter" selected. A message at the top of the table indicates "Previewing a limited number of records. Run the report to see everything."

	Account Owner	Account Name	Billing State/Province	Billing City	Type	Industry
1	Fred Williamson	Acme	NY	New York	Prospect	Manufacturing
2	Fred Williamson	salesforce.com	CA	San Francisco	Customer	Technology
3	Fred Williamson	Global Media	Ontario	Toronto	Prospect	Media
4	Fred Williamson	Global Retail	-	-	Customer	Retail
5						

To see which accounts have escalated cases, create an accounts report and add a cross filter. Set the cross filter to show accounts with cases. Then, filter cases for *status equals escalated*.

Create a Cross Filter

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

▶ Watch a video:

- [▶ How to Use Cross Filters \(Lightning Experience\)](#)

- [Using Cross Filters in Reports \(Salesforce Classic\)](#)

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The screenshot shows the Salesforce Classic Reports interface. The report is titled "Accounts with Escalated Cases" and is currently in the "ACCOUNTS" view. The left sidebar shows the "FILTERS" tab with a dropdown menu open, highlighting the "Add Cross Filter" option. The main table displays a list of accounts with columns for Account Owner, Account Name, Billing State/Province, Billing City, Type, and Industry. The data rows are as follows:

	Account Owner	Account Name	Billing State/Province	Billing City	Type	Industry
1	Fred Williamson	Acme	NY	New York	Prospect	Manufacturing
2	Fred Williamson	salesforce.com	CA	San Francisco	Customer	Technology
3	Fred Williamson	Global Media	Ontario	Toronto	Prospect	Media
4	Fred Williamson	Global Retail	-	-	Customer	Retail
5						


Cross filters are available in both Lightning Experience and Salesforce Classic. Cross filters that you create in Lightning Experience work in Salesforce Classic, and vice versa.

The steps for creating a cross filter are a little different depending on whether you're using Lightning Experience or Salesforce Classic. Follow the instructions based on whether you're using the Lightning Experience or the Salesforce Classic report builder.


Create a Cross Filter in the Lightning Experience Report Builder

1. Edit or create a report.
2. From the FILTERS tab, click > **Add Cross Filter**.
3. Choose whether to show your primary object **with** or **without** a secondary object. Then, choose the secondary object.
4. Click **Apply**.
5. Optionally, to add a filter to the secondary object, click **Add Secondary Object Filter**, where *Secondary Object* is the name of the secondary object.
 - a. Choose a field from the secondary object.
 - b. Specify an operator and values for the secondary object filter.
 - c. Click **Apply**.
6. Click **Save**.

Create a Cross Filter in the Salesforce Classic Report Builder

1. Edit or create a report.
2. From the Filters pane, click **Add > Cross Filter**.
3. Select a parent object from the dropdown 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.
4. Choose *with* or *without*.
5. Select a child object from the dropdown or search by its name. The dropdown list contains all eligible child objects of your selected parent object.
6. Optionally, to add filters on the secondary object, add subfilters:
 - a. Click **Add Secondary Object Filter**, where *Secondary Object* is the name of the secondary object.
 - 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.
7. Click **OK**.
8. Click **Save**.

The report filters based on the primary-secondary object relationship and any additional filters on the secondary object.

 **Note:** In Lightning Experience, although cross filters still filter the report, they do not appear in the Filters panel on the report run page. If you have permission to edit a report, you can view cross filters in the report builder.

Example: Use WITH in Cross Filters

Use cross filters to filter a report by an object's child objects using WITH conditions. For example, filter a report to show just accounts with cases.

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.

Find Accounts with Cases in the Lightning Experience Report Builder

1. Edit or create a report based on the Accounts report type.
2. Create a filter where *Billing State/Province equals CA* and click **OK**.

Now your report shows all accounts in California. To see Californian accounts with cases, let's add a cross filter: *Accounts with Cases*.

3. Click  > **Add Cross Filter**.

4. From the Show Me dropdown, select **Accounts**.
5. From the Operator dropdown, select **with**.
6. From the Secondary Object dropdown, select **Cases**.
7. Click **Apply**.
8. Click **Save**.

Find Accounts with Cases in the Salesforce Classic Report Builder

1. Edit or create a report based on the Accounts report type.
2. Create a field filter where *Billing State/Province equals CA* and click **OK**.
Now your report shows all accounts in California. To see Californian accounts with cases, let's add a cross filter: *Accounts with Cases*.
3. From the Filters pane, click **Add > Cross Filter**.
4. From the Primary Object dropdown (left of the operator), choose **Accounts**.
5. From the operator dropdown, choose **with**.
6. From the Secondary Object dropdown (right of the operator), choose **Cases**.
7. Click **OK**.
8. Click **Save**.


When you run the report, the results include only California accounts with associated cases.

Example: Use WITHOUT in Cross Filters

Use cross filters to filter a report by an object's child objects using WITHOUT conditions. For example, filter a report to show just contacts without activities.

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:

Find Accounts with Missing Contacts in the Lightning Experience Report Builder

1. Edit or create a report based on the Accounts report type.
2. Create a filter where *Billing State/Province equals CA* and click **OK**.
Now your report shows all accounts in California. To see Californian accounts without contacts, let's add a cross filter: *Accounts without Contacts*.
3. Click  > **Add Cross Filter**.
4. From the Show Me dropdown, select **Accounts**.
5. From the Operator dropdown, select **without**.
6. From the Secondary Object dropdown, select **Contacts**.
7. Click **Apply**.
8. Click **Save**.

Find Accounts with Missing Contacts in the Salesforce Classic Report Builder

1. Edit or create a report based on the Accounts report type.
2. Create a field filter where *Billing State/Province equals CA* and click **OK**.

Now your report shows all accounts in California. To see Californian accounts without contacts, let's add a cross filter: *Accounts without Contacts*.

3. From the Filters pane, click **Add > Cross Filter**.
4. From the Primary Object dropdown (left of the operator), choose **Accounts**.
5. From the operator dropdown, choose **without**.
6. From the Secondary Object dropdown (right of the operator), choose **Contacts**.
7. Click **OK**.
8. Click **Save**.


When you run the report, the results include only California accounts without an associated contact.

Example: Multiple Cross Filters and a Subfilter


Use cross filters to filter a report by an object's child objects using both WITH and WITHOUT conditions. For example, filter a report to show accounts that have cases but don't have activities.

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

Find Accounts with Escalated Cases and without Activities in the Lightning Experience Report Builder

1. Edit or create a report based on the Accounts report type.
 2. Click  > **Add Cross Filter**.
 3. From the Show Me dropdown, select **Accounts**.
 4. From the Operator dropdown, select **with**.
 5. From the Secondary Object dropdown, select **Cases**.
 6. Click **Apply**.
- The report now shows Accounts that have Cases.
7. Refine the cross filter so that the report shows Accounts that have Escalated Cases:
 - a. Click **Add Cases Filter**.
 - b. Select **Status**.
 - c. Select **Escalated**.
 - d. Click **Apply**.

Now, add another cross filter so that the report shows only Accounts without Activities.

8. Click  > **Add Cross Filter**.
9. From the Show Me dropdown, select **Accounts**.
10. From the Operator dropdown, select **without**.
11. From the Secondary Object dropdown, select **Activities**.
12. Click **Apply**.
13. Click **Save**.

Find Accounts with Escalated Cases and without Activities in the Salesforce Classic Report Builder

1. Edit or create a report based on the Accounts report type.
2. From the Filters pane, click **Add > Cross Filter**.
3. From the Primary Object dropdown (left of the operator), choose **Accounts**.
4. From the operator dropdown, choose **with**.
5. From the Secondary Object dropdown (right of the operator), choose **Cases**.
6. Refine the cross filter so that the report shows Accounts that have Escalated Cases:
 - a. Click **Add Cases Filter**.
 - b. From the Case Field dropdown, select **Status**.
 - c. From the Operator dropdown, select **equals**.
 - d. From the picklist lookup, enter or select **Escalated**.
7. Click **OK**.

Now, add another cross filter so that the report shows only Accounts without Activities.

8. From the Filters pane, click **Add > Cross Filter**.
9. From the Primary Object dropdown (left of the operator), choose **Accounts**.
10. From the operator dropdown, choose **with**.
11. From the Secondary Object dropdown (right of the operator), choose **Cases**.
12. Click **Save**.

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

Cross Filter Considerations and Limits

As you create and work with cross filters, take note of these considerations and limits.

Considerations

- 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. Choosing a report type of Accounts with Partners and adding a cross filter for *Accounts without Partners* will yield no results.
- In Lightning Experience, although cross filters appear on the run page, you cannot change their values on the run page. If you have permission to edit a report, you can change cross filter values in the report builder.
- When you filter on a Salesforce object ID, the ID must be 15 or 18 characters in length and the ID is not case-sensitive.

Limits

- Each report can have up to 3 cross filters.
- Each cross filter can have up to 5 subfilters.
- Filter logic doesn't apply to cross filters.