Salesforce Reports and Dashboards REST API Developer Guide

Version 66.0, Spring '26

Last updated: March 27, 2026

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CHAPTER 1 Overview

In this chapter ...

- Build the Resource URL
- Requirements and Limitations
- API End-of-Life Policy

The Reports and Dashboards REST API gives you programmatic access to your report and dashboard data as defined in the report builder and dashboard builder. The API lets you integrate the data into any web or mobile application, inside or outside the Salesforce platform. For example, you might use the API to trigger a Chatter post with a snapshot of top-performing reps each quarter.

The Reports and Dashboards REST API will revolutionize the way you access and visualize your data. You can:

- Integrate report data into custom objects.
- Define rich visualizations on top of the API to animate the data.
- Build custom dashboards.
- Automate reporting tasks.

At a high level, the API resources let you query and filter report data. You can:

- Run tabular, summary, or matrix reports synchronously or asynchronously.
- Filter for specific data on the fly.
- Query report metadata.

You can also work with dashboard resources to:

- Get a list of recently used dashboards.
- Get dashboard metadata and data.
- Query dashboard status.
- Refresh dashboards.

Build the Resource URL

Access all Reports and Dashboards REST API resources by using the URI for your Salesforce org, combined with version and Experience Cloud site information, and the URI for the resource.

When building a URL, start with your My Domain login URL. To get your My Domain name, use the getMyDomainName() Apex method. You can also find your full My Domain login URL on the My Domain page in Setup.

```
https://MyDomainName.my.salesforce.com
```

Then add the version information:

```
/services/data/v66.0
```

Then add the resource:

```
/analytics/reports
```

Put together, the full URL is:

```
https://MyDomainName.my.salesforce.com/services/data/v66.0/analytics/reports
```

Some resources, such as `notifications`, often require one or more URL parameters without which API requests return an error:

```
https://MyDomainName.my.salesforce.com/services/data/v66.0/analytics/notifications?source=lightningReportSubscribe
```

Requirements and Limitations

The Reports and Dashboards REST API is available for any organization that has API enabled. You must establish an authenticated session using OAuth in order to access the Reports and Dashboards REST API. When working with this API, consider these restrictions in addition to general API limits.

To use the Analytics Download API, your org must have a CRM Analytics license. In addition, your org needs both Slack for Salesforce and CRM Analytics for Slack enabled. For more information, see Enable Salesforce for Slack Integrations.

> **Note:** Responses and requests are in JSON. While using the Reports and Dashboards REST API with a POST request body, you must use content-type: application/json. If you don't use this content type, then you could get unexpected results.

Reports Limits

- Cross filters, standard report filters, and filtering by row limit are unavailable when filtering data.
- Historical tracking reports are only supported for matrix reports.
- Subscriptions aren't supported for historical tracking reports.
- The API can process only reports that contain up to 100 fields selected as columns.
- A list of up to 200 recently viewed reports can be returned.
- Your org can request up to 500 synchronous report runs per hour.
- The API supports up to 20 synchronous report run requests at a time.
- A list of up to 2,000 instances of a report that was run asynchronously can be returned.
- The API supports up to 200 requests at a time to get results of asynchronous report runs.
- Your organization can request up to 1,200 asynchronous requests per hour.
- Asynchronous report run results are available within a 24-hour rolling period.
- The API returns up to the first 2,000 report rows. You can narrow results using filters.

- You can add up to 20 custom field filters when you run a report.
- If a report is run on a standard or custom object as an automated process user from an Apex test class, only the required custom fields are returned. Non-required custom fields aren't shown in the results.
- – Your org can request up to 200 dashboard refreshes per hour.
  - – Your org can request results for up to 5,000 dashboards per hour.

Dashboards Limits

- Your org can request up to 200 dashboard refreshes per hour.
- Your org can request results for up to 5,000 dashboards per hour.

Analytics Notification Limits

- Each user can subscribe to up to 5 reports.
- Each user can create up to 5 Analytics notifications.

Note: All limits that apply to reports created in the report builder also apply to the API, as do limits for dashboards created in the dashboard builder. For more information, see "Salesforce Reports and Dashboards Limits" in Salesforce Help.

Analytics Download Limits

- Each user can make 3 concurrent requests to download Analytics assets.

API End-of-Life Policy

Salesforce is committed to supporting each API version for a minimum of three years from the date of first release. In order to mature and improve the quality and performance of the API, versions that are more than three years old might cease to be supported.

When an API version is to be deprecated, advance notice is given at least one year before support ends. Salesforce will directly notify customers using API versions planned for deprecation.

Salesforce API Versions	Version Support Status	Version Retirement Info
Versions 31.0 through 66.0	Supported.	
Versions 21.0 through 30.0	As of Summer '25, these versions are retired and unavailable.	Salesforce Platform API Versions 21.0 through 30.0 Retirement
Versions 7.0 through 20.0	As of Summer '22, these versions are retired and unavailable.	Salesforce Platform API Versions 7.0 through 20.0 Retirement

If you request any resource or use an operation from a retired API version, REST API returns `410:GONE` error code.

To identify requests made from old or unsupported API versions of REST API, access the free API Total Usage event type.

CHAPTER 2 Examples

In this chapter ...

- Reports Examples
- Dashboards Examples
- Downloads Examples
- Notifications Examples

Learn how to run a report, refresh dashboard data, and send analytic notifications with these hands-on Reports and Dashboards REST API examples.

Reports Examples

Learn how to run, create, edit, or delete reports with the Reports REST API. Running a report returns a *fact map* that describes report data. Learn how to read report fact maps.

For information about different ways to execute the Reports REST API, see Send REST Request with cURL and Authorization Through Connected Apps and OAuth 2.0.

Create a New Report
Create a new report using a POST request.

Run Reports Synchronously or Asynchronously

Get Report Metadata

Get a List of Report Types
Return a list of analytics notifications using a GET request.

Download Formatted Excel Reports Using the Reports REST API
You can use the Reports REST API to request reports in printer-friendly Excel format.

List Asynchronous Runs of a Report

Filter Reports on Demand

List Recently Viewed Reports

Decode the Fact Map

Get Report Data without Saving Changes to or Creating a Report
Run a report without creating a report or changing an existing one by making a POST request to the `query` resource. Get report data without filling up your org with unnecessary reports.

Save Changes to Reports
Save changes to a report by sending a PATCH request to the Report resource.

Clone Reports
Creates a copy of a custom, standard, or public report by sending a POST request to the Report List resource.

Delete Reports
Delete a report by sending a DELETE request to the Report resource. Deleted reports are moved to the Recycle Bin.

Create a New Report

Create a new report using a POST request.

Example Usage

`/services/data/v39.0/analytics/reports`

Example Request Body

To create a report, you only have to specify `reportMetadata` with a `name` and a `reportType` to create a new report. Other properties are optional.

```
{
  "reportMetadata": {
    "name":"NewReport",
    "reportType": {
```

```
      "type" : "Opportunity"
    }
  }
}
```

Example Response Body

The response includes the new report's `reportExtendedMetadata`, `reportMetadata`, and `reportTypeMetadata`.

```
{
  "reportExtendedMetadata" : {
    "aggregateColumnInfo" : {
      "RowCount" : {
        "dataType" : "int",
        "label" : "Record Count"
      }
    },
    "detailColumnInfo" : {
      "ROLLUP_DESCRIPTION" : {
        "dataType" : "string",
        "label" : "Owner Role"
      },
      "FULL_NAME" : {
        "dataType" : "string",
        "label" : "Opportunity Owner"
      },
      "ACCOUNT_NAME" : {
        "dataType" : "string",
        "label" : "Account Name"
      },
      "OPPORTUNITY_NAME" : {
        "dataType" : "string",
        "label" : "Opportunity Name"
      },
      "STAGE_NAME" : {
        "dataType" : "picklist",
        "label" : "Stage"
      },
      "FISCAL_QUARTER" : {
        "dataType" : "string",
        "label" : "Fiscal Period"
      },
      "AMOUNT" : {
        "dataType" : "currency",
        "label" : "Amount"
      },
      "PROBABILITY" : {
        "dataType" : "percent",
        "label" : "Probability (%)"
      },
      "AGE" : {
        "dataType" : "int",
        "label" : "Age"
      },
      "CLOSE_DATE" : {
        "dataType" : "date",
```

```
        "label" : "Close Date"
      },
      "CREATED_DATE" : {
        "dataType" : "datetime",
        "label" : "Created Date"
      },
      "NEXT_STEP" : {
        "dataType" : "string",
        "label" : "Next Step"
      },
      "LEAD_SOURCE" : {
        "dataType" : "picklist",
        "label" : "Lead Source"
      },
      "TYPE" : {
        "dataType" : "picklist",
        "label" : "Type"
      }
    },
    "groupingColumnInfo" : { }
  },
  "reportMetadata" : {
    "aggregates" : [ "RowCount" ],
    "chart" : null,
    "crossFilters" : [ ],
    "currency" : null,
    "description" : null,
    "detailColumns" : [ "ROLLUP_DESCRIPTION", "FULL_NAME", "ACCOUNT_NAME",
"OPPORTUNITY_NAME", "STAGE_NAME", "FISCAL_QUARTER", "AMOUNT", "PROBABILITY", "AGE",
"CLOSE_DATE", "CREATED_DATE", "NEXT_STEP", "LEAD_SOURCE", "TYPE" ],
    "developerName" : "DocTest2_mG",
    "division" : null,
    "folderId" : "005R0000000Kg8cIAC",
    "groupingsAcross" : [ ],
    "groupingsDown" : [ ],
    "hasDetailRows" : true,
    "hasRecordCount" : true,
    "historicalSnapshotDates" : [ ],
    "id" : "00OR0000000PYkiMAG",
    "name" : "DocTest2",
    "reportBooleanFilter" : null,
    "reportFilters" : [ ],
    "reportFormat" : "TABULAR",
    "reportType" : {
      "label" : "Opportunities",
      "type" : "Opportunity"
    },
    "scope" : "organization",
    "showGrandTotal" : true,
    "showSubtotals" : true,
    "sortBy" : [ ],
    "standardDateFilter" : {
      "column" : "CLOSE_DATE",
      "durationValue" : "THIS_FISCAL_QUARTER",
```

```
    "endDate" : "2016-12-31",
    "startDate" : "2016-10-01"
  },
  "standardFilters" : [ {
    "name" : "open",
    "value" : "all"
  }, {
    "name" : "probability",
    "value" : ">0"
  } ],
  "supportsRoleHierarchy" : true,
  "userOrHierarchyFilterId" : null
},
"reportTypeMetadata" : {
  "categories" : [ {
    "columns" : {
      "CREATED" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Created By"
      },
      "CREATED_ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Created Alias"
      },
      "LAST_UPDATE_BY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Last Modified By"
      },
      "LAST_UPDATE_BY_ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Last Modified Alias"
      },
      "OPPORTUNITY_NAME" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Opportunity Name"
      },
      "TYPE" : {
        "dataType" : "picklist",
        "filterValues" : [ {
          "label" : "Existing Business",
          "name" : "Existing Business"
        }, {
          "label" : "New Business",
          "name" : "New Business"
```

```
    } ],
    "filterable" : true,
    "label" : "Type"
  },
  "LEAD_SOURCE" : {
    "dataType" : "picklist",
    "filterValues" : [ {
      "label" : "Advertisement",
      "name" : "Advertisement"
    }, {
      "label" : "Employee Referral",
      "name" : "Employee Referral"
    }, {
      "label" : "External Referral",
      "name" : "External Referral"
    }, {
      "label" : "Partner",
      "name" : "Partner"
    }, {
      "label" : "Public Relations",
      "name" : "Public Relations"
    }, {
      "label" : "Seminar - Internal",
      "name" : "Seminar - Internal"
    }, {
      "label" : "Seminar - Partner",
      "name" : "Seminar - Partner"
    }, {
      "label" : "Trade Show",
      "name" : "Trade Show"
    }, {
      "label" : "Web",
      "name" : "Web"
    }, {
      "label" : "Word of mouth",
      "name" : "Word of mouth"
    }, {
      "label" : "Other",
      "name" : "Other"
    } ],
    "filterable" : true,
    "label" : "Lead Source"
  },
  "PARTNER_NAME" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Primary Partner"
  },
  "AMOUNT" : {
    "dataType" : "currency",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Amount"
```

```
},
"CLOSED" : {
  "dataType" : "boolean",
  "filterValues" : [ {
    "label" : "True",
    "name" : "True"
  }, {
    "label" : "False",
    "name" : "False"
  } ],
  "filterable" : true,
  "label" : "Closed"
},
"WON" : {
  "dataType" : "boolean",
  "filterValues" : [ {
    "label" : "True",
    "name" : "True"
  }, {
    "label" : "False",
    "name" : "False"
  } ],
  "filterable" : true,
  "label" : "Won"
},
"CLOSE_DATE" : {
  "dataType" : "date",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Close Date"
},
"CLOSE_DATE2" : {
  "dataType" : "date",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Close Date (2)"
},
"CLOSE_MONTH" : {
  "dataType" : "date",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Close Month"
},
"LAST_STAGE_CHANGE_DATE" : {
  "dataType" : "datetime",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Last Stage Change Date"
},
"NEXT_STEP" : {
  "dataType" : "string",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Next Step"
```

```
},
"STAGE_NAME" : {
  "dataType" : "picklist",
  "filterValues" : [ {
    "label" : "Prospecting",
    "name" : "Prospecting"
  }, {
    "label" : "Qualification",
    "name" : "Qualification"
  }, {
    "label" : "Needs Analysis",
    "name" : "Needs Analysis"
  }, {
    "label" : "Value Proposition",
    "name" : "Value Proposition"
  }, {
    "label" : "Id. Decision Makers",
    "name" : "Id. Decision Makers"
  }, {
    "label" : "Perception Analysis",
    "name" : "Perception Analysis"
  }, {
    "label" : "Proposal/Price Quote",
    "name" : "Proposal/Price Quote"
  }, {
    "label" : "Negotiation/Review",
    "name" : "Negotiation/Review"
  }, {
    "label" : "Closed Won",
    "name" : "Closed Won"
  }, {
    "label" : "Closed Lost",
    "name" : "Closed Lost"
  } ],
  "filterable" : true,
  "label" : "Stage"
},
"PROBABILITY" : {
  "dataType" : "percent",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Probability (%)"
},
"FISCAL_QUARTER" : {
  "dataType" : "string",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Fiscal Period"
},
"FISCAL_YEAR" : {
  "dataType" : "int",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Fiscal Year"
```

```
},
"AGE" : {
  "dataType" : "int",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Age"
},
"STAGE_DURATION" : {
  "dataType" : "int",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Stage Duration"
},
"FORECAST_CATEGORY" : {
  "dataType" : "picklist",
  "filterValues" : [ {
    "label" : "Omitted",
    "name" : "Omitted"
  }, {
    "label" : "Pipeline",
    "name" : "Pipeline"
  }, {
    "label" : "Best Case",
    "name" : "Best Case"
  }, {
    "label" : "Commit",
    "name" : "Commit"
  }, {
    "label" : "Closed",
    "name" : "Closed"
  } ],
  "filterable" : true,
  "label" : "Forecast Category"
},
"OPPORTUNITY_ID" : {
  "dataType" : "id",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Opportunity ID"
},
"LAST_ACTIVITY" : {
  "dataType" : "date",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Last Activity"
},
"DESCRIPTION" : {
  "dataType" : "textarea",
  "filterValues" : [ ],
  "filterable" : true,
  "label" : "Description"
},
"HASOPPLINEITEM" : {
  "dataType" : "boolean",
```

```
        "filterValues" : [ {
          "label" : "True",
          "name" : "True"
        }, {
          "label" : "False",
          "name" : "False"
        } ],
        "filterable" : true,
        "label" : "Has Products"
      },
      "CREATED_DATE" : {
        "dataType" : "datetime",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Created Date"
      },
      "LAST_UPDATE" : {
        "dataType" : "datetime",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Last Modified Date"
      }
    },
    "label" : "Opportunity Information"
  }, {
    "columns" : {
      "FULL_NAME" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Opportunity Owner"
      },
      "ROLLUP_DESCRIPTION" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Owner Role"
      },
      "ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Opportunity Owner Alias"
      },
      "OWNER_EMAIL" : {
        "dataType" : "email",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Opportunity Owner Email"
      },
      "OWNER_PHONE" : {
        "dataType" : "phone",
        "filterValues" : [ ],
        "filterable" : true,
```

```
    "label" : "Opportunity Owner: Phone"
  },
  "OWNER_MOBILE_PHONE" : {
    "dataType" : "phone",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Mobile Phone"
  },
  "OWNER_MANAGER" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Manager"
  },
  "OWNER_TITLE" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Title"
  },
  "OWNER_COMPANY" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Company"
  },
  "OWNER_DEPARTMENT" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Department"
  },
  "OWNER_DIVISION" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Division"
  },
  "OWNER_PROFILE" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Opportunity Owner: Profile"
  },
  "OWNER_ACTIVE" : {
    "dataType" : "boolean",
    "filterValues" : [ {
      "label" : "True",
      "name" : "True"
    }, {
      "label" : "False",
      "name" : "False"
    } ],
    "filterable" : true,
```

```
        "label" : "Opportunity Owner: Active"
      }
    },
    "label" : "Opportunity Owner Information"
  }, {
    "columns" : {
      "ACCOUNT_NAME" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Account Name"
      },
      "ACCOUNT_OWNER" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Account Owner"
      },
      "ACCOUNT_OWNER_ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Account Owner Alias"
      },
      "PARENT_NAME" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Parent Account"
      },
      "PARENT_ID" : {
        "dataType" : "id",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Parent Account ID"
      },
      "SALES" : {
        "dataType" : "currency",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Annual Revenue"
      },
      "ACCOUNT_TYPE" : {
        "dataType" : "picklist",
        "filterValues" : [ {
          "label" : "Analyst",
          "name" : "Analyst"
        }, {
          "label" : "Competitor",
          "name" : "Competitor"
        }, {
          "label" : "Customer",
          "name" : "Customer"
        }, {
```

```
      "label" : "Integrator",
      "name" : "Integrator"
    }, {
      "label" : "Investor",
      "name" : "Investor"
    }, {
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      "name" : "Partner"
    }, {
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    }, {
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    }, {
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    "label" : "Retail",
    "name" : "Retail"
  }, {
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    "filterValues" : [ ],
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    "label" : "Account: Last Activity"
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  "ACCOUNT_CREATED_DATE" : {
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    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Account: Created Date"
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    "label" : "Account: Last Modified Date"
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  "ACCOUNT_DESCRIPTION" : {
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        "filterValues" : [ ],
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        "filterValues" : [ ],
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      "ADDRESS1_LINE3" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Billing Address Line 3"
      },
      "ADDRESS1_CITY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Billing City"
      },
      "ADDRESS1_STATE" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Billing State/Province"
      },
      "ADDRESS1_ZIP" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Billing Zip/Postal Code"
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      "ADDRESS1_COUNTRY" : {
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        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Billing Country"
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        "filterValues" : [ ],
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        "filterValues" : [ ],
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        "filterValues" : [ ],
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        "label" : "Shipping Address Line 3"
      },
      "ADDRESS2_CITY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Shipping City"
      },
      "ADDRESS2_STATE" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Shipping State/Province"
      },
      "ADDRESS2_ZIP" : {
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        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Shipping Zip/Postal Code"
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      "ADDRESS2_COUNTRY" : {
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        "filterValues" : [ ],
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    "columns" : {
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        "dataType" : "phone",
        "filterValues" : [ ],
        "filterable" : true,
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    "PHONE2" : {
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      "filterValues" : [ ],
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      "label" : "Fax"
    },
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      "filterValues" : [ ],
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      "label" : "Website"
    }
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  "label" : "Account: Ph/Fax"
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    },
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      "filterValues" : [ ],
      "filterable" : true,
      "label" : "Contact: Title"
    },
    "CON.PHONE" : {
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      "filterValues" : [ ],
      "filterable" : true,
      "label" : "Contact: Phone"
    },
    "CON.EMAIL" : {
      "dataType" : "email",
      "filterValues" : [ ],
      "filterable" : true,
      "label" : "Contact: Email"
    }
  },
  "label" : "Primary Contact"
}, {
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      "filterValues" : [ ],
      "filterable" : true,
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    },
    "CON.ADDRESS2_LINE1" : {
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  },
  "CON.ADDRESS2_LINE2" : {
    "dataType" : "string",
    "filterValues" : [ ],
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  },
  "CON.ADDRESS2_LINE3" : {
    "dataType" : "string",
    "filterValues" : [ ],
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    "label" : "Mailing Address Line 3"
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  "CON.ADDRESS2_CITY" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Mailing City"
  },
  "CON.ADDRESS2_STATE" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Mailing State/Province"
  },
  "CON.ADDRESS2_ZIP" : {
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    "filterValues" : [ ],
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    "filterValues" : [ ],
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    "label" : "Other Street"
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  "CON.ADDRESS1_LINE1" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "label" : "Other Address Line 1"
  },
  "CON.ADDRESS1_LINE2" : {
    "dataType" : "string",
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      "CON.ADDRESS1_LINE3" : {
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        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Other Address Line 3"
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      "CON.ADDRESS1_CITY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Other City"
      },
      "CON.ADDRESS1_STATE" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Other State/Province"
      },
      "CON.ADDRESS1_ZIP" : {
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        "filterValues" : [ ],
        "filterable" : true,
        "label" : "Other Zip/Postal Code"
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    "label" : "Contact: Address"
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      "label" : "greater than",
      "name" : "greaterThan"
    }, {
      "label" : "less or equal",
      "name" : "lessOrEqual"
    }, {
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    "name" : "greaterOrEqual"
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    "name" : "contains"
  }, {
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    "name" : "notContain"
  }, {
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    "name" : "startsWith"
  } ],
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    }, {
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      "name" : "lessOrEqual"
    }, {
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    "name" : "lessThan"
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    "name" : "greaterThan"
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    "name" : "lessThan"
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```
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  "name" : "greaterOrEqual"
} ],
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} ],
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}, {
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}, {
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  "name" : "lessThan"
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```
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      "name" : "greaterThan"
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      "name" : "greaterOrEqual"
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      "name" : "equals"
    }, {
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      "name" : "notEqual"
    }, {
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      "name" : "startsWith"
    } ],
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      "name" : "equals"
    }, {
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      "name" : "notEqual"
    }, {
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    }, {
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      "name" : "greaterThan"
    }, {
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      "name" : "lessOrEqual"
    }, {
      "label" : "greater or equal",
      "name" : "greaterOrEqual"
    }, {
      "label" : "contains",
      "name" : "contains"
    }, {
      "label" : "does not contain",
      "name" : "notContain"
    }, {
      "label" : "starts with",
      "name" : "startsWith"
    } ]
  },
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    "values" : [ {
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      "label" : "My team's opportunities",
      "value" : "team"
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      "allowsDivision" : true,
      "label" : "All opportunities",
      "value" : "organization"
    } ]
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    "standardDateFilterDurations" : [ {
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      "label" : "Custom",
      "startDate" : "2016-12-13",
      "value" : "CUSTOM"
    } ]
  }, {
    "label" : "Fiscal Year",
    "standardDateFilterDurations" : [ {
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      "label" : "Current FY",
      "startDate" : "2016-01-01",
      "value" : "THIS_FISCAL_YEAR"
    }, {
      "endDate" : "2015-12-31",
      "label" : "Previous FY",
      "startDate" : "2015-01-01",
      "value" : "LAST_FISCAL_YEAR"
    }, {
      "endDate" : "2015-12-31",
      "label" : "Previous 2 FY",
      "startDate" : "2014-01-01",
      "value" : "LAST_N_FISCAL_YEARS:2"
    }, {
      "endDate" : "2014-12-31",
      "label" : "2 FY Ago",
      "startDate" : "2014-01-01",
      "value" : "LAST_N_FISCAL_YEARS_AGO:2"
    }, {
      "endDate" : "2017-12-31",
      "label" : "Next FY",
      "startDate" : "2017-01-01",
      "value" : "NEXT_FISCAL_YEAR"
    }, {
      "endDate" : "2016-12-31",
      "label" : "Current and Previous FY",
      "startDate" : "2015-01-01",
      "value" : "THIS_AND_LAST_FISCAL_YEAR:2"
    }, {
      "endDate" : "2016-12-31",
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```
      "label" : "Current and Previous 2 FY",
      "startDate" : "2014-01-01",
      "value" : "THIS_AND_LAST_N_FISCAL_YEARS:2"
    }, {
      "endDate" : "2017-12-31",
      "label" : "Current and Next FY",
      "startDate" : "2016-01-01",
      "value" : "THIS_AND_NEXT_FISCAL_YEAR"
    } ]
  }, {
    "label" : "Fiscal Quarter",
    "standardDateFilterDurations" : [ {
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      "label" : "Current FQ",
      "startDate" : "2016-10-01",
      "value" : "THIS_FISCAL_QUARTER"
    }, {
      "endDate" : "2017-03-31",
      "label" : "Current and Next FQ",
      "startDate" : "2016-10-01",
      "value" : "THIS_AND_NEXT_FISCAL_QUARTER"
    }, {
      "endDate" : "2016-12-31",
      "label" : "Current and Previous FQ",
      "startDate" : "2016-07-01",
      "value" : "LAST_AND_THIS_FISCAL_QUARTER"
    }, {
      "endDate" : "2017-03-31",
      "label" : "Next FQ",
      "startDate" : "2017-01-01",
      "value" : "NEXT_FISCAL_QUARTER"
    }, {
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      "label" : "Previous FQ",
      "startDate" : "2016-07-01",
      "value" : "LAST_FISCAL_QUARTER"
    }, {
      "endDate" : "2017-09-30",
      "label" : "Current and Next 3 FQ",
      "startDate" : "2016-10-01",
      "value" : "THIS_AND_NEXT_N_FISCAL_QUARTERS:3"
    } ]
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      "label" : "Current CY",
      "startDate" : "2016-01-01",
      "value" : "THIS_YEAR"
    }, {
      "endDate" : "2015-12-31",
      "label" : "Previous CY",
      "startDate" : "2015-01-01",
      "value" : "LAST_YEAR"
```

```
    }, {
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      "label" : "Previous 2 CY",
      "startDate" : "2014-01-01",
      "value" : "LAST_N_YEARS:2"
    }, {
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      "label" : "2 CY Ago",
      "startDate" : "2014-01-01",
      "value" : "LAST_N_YEARS_AGO:2"
    }, {
      "endDate" : "2017-12-31",
      "label" : "Next CY",
      "startDate" : "2017-01-01",
      "value" : "NEXT_YEAR"
    }, {
      "endDate" : "2016-12-31",
      "label" : "Current and Previous CY",
      "startDate" : "2015-01-01",
      "value" : "THIS_AND_LAST_YEAR:2"
    }, {
      "endDate" : "2016-12-31",
      "label" : "Current and Previous 2 CY",
      "startDate" : "2014-01-01",
      "value" : "THIS_AND_LAST_N_YEARS:2"
    }, {
      "endDate" : "2017-12-31",
      "label" : "Current and Next CY",
      "startDate" : "2016-01-01",
      "value" : "THIS_AND_NEXT_YEAR"
    } ]
  }, {
    "label" : "Calendar Quarter",
    "standardDateFilterDurations" : [ {
      "endDate" : "2016-12-31",
      "label" : "Current CQ",
      "startDate" : "2016-10-01",
      "value" : "THIS_QUARTER"
    }, {
      "endDate" : "2017-03-31",
      "label" : "Current and Next CQ",
      "startDate" : "2016-10-01",
      "value" : "THIS_AND_NEXT_QUARTER"
    }, {
      "endDate" : "2016-12-31",
      "label" : "Current and Previous CQ",
      "startDate" : "2016-07-01",
      "value" : "LAST_AND_THIS_QUARTER"
    }, {
      "endDate" : "2017-03-31",
      "label" : "Next CQ",
      "startDate" : "2017-01-01",
      "value" : "NEXT_QUARTER"
    }, {
```

```
      "endDate" : "2016-09-30",
      "label" : "Previous CQ",
      "startDate" : "2016-07-01",
      "value" : "LAST_QUARTER"
    }, {
      "endDate" : "2017-09-30",
      "label" : "Current and Next 3 CQ",
      "startDate" : "2016-10-01",
      "value" : "THIS_AND_NEXT_N_QUARTERS:3"
    } ]
  }, {
    "label" : "Calendar Month",
    "standardDateFilterDurations" : [ {
      "endDate" : "2016-11-30",
      "label" : "Last Month",
      "startDate" : "2016-11-01",
      "value" : "LAST_MONTH"
    }, {
      "endDate" : "2016-12-31",
      "label" : "This Month",
      "startDate" : "2016-12-01",
      "value" : "THIS_MONTH"
    }, {
      "endDate" : "2017-01-31",
      "label" : "Next Month",
      "startDate" : "2017-01-01",
      "value" : "NEXT_MONTH"
    }, {
      "endDate" : "2016-12-31",
      "label" : "Current and Previous Month",
      "startDate" : "2016-11-01",
      "value" : "LAST_AND_THIS_MONTH"
    }, {
      "endDate" : "2017-01-31",
      "label" : "Current and Next Month",
      "startDate" : "2016-12-01",
      "value" : "THIS_AND_NEXT_MONTH"
    } ]
  }, {
    "label" : "Calendar Week",
    "standardDateFilterDurations" : [ {
      "endDate" : "2016-12-10",
      "label" : "Last Week",
      "startDate" : "2016-12-04",
      "value" : "LAST_WEEK"
    }, {
      "endDate" : "2016-12-17",
      "label" : "This Week",
      "startDate" : "2016-12-11",
      "value" : "THIS_WEEK"
    }, {
      "endDate" : "2016-12-24",
      "label" : "Next Week",
      "startDate" : "2016-12-18",
```

```
      "value" : "NEXT_WEEK"
    } ]
  }, {
    "label" : "Day",
    "standardDateFilterDurations" : [ {
      "endDate" : "2016-12-12",
      "label" : "Yesterday",
      "startDate" : "2016-12-12",
      "value" : "YESTERDAY"
    }, {
      "endDate" : "2016-12-13",
      "label" : "Today",
      "startDate" : "2016-12-13",
      "value" : "TODAY"
    }, {
      "endDate" : "2016-12-14",
      "label" : "Tomorrow",
      "startDate" : "2016-12-14",
      "value" : "TOMORROW"
    }, {
      "endDate" : "2016-12-13",
      "label" : "Last 7 Days",
      "startDate" : "2016-12-07",
      "value" : "LAST_N_DAYS:7"
    }, {
      "endDate" : "2016-12-13",
      "label" : "Last 30 Days",
      "startDate" : "2016-11-14",
      "value" : "LAST_N_DAYS:30"
    }, {
      "endDate" : "2016-12-13",
      "label" : "Last 60 Days",
      "startDate" : "2016-10-15",
      "value" : "LAST_N_DAYS:60"
    }, {
      "endDate" : "2016-12-13",
      "label" : "Last 90 Days",
      "startDate" : "2016-09-15",
      "value" : "LAST_N_DAYS:90"
    }, {
      "endDate" : "2016-12-13",
      "label" : "Last 120 Days",
      "startDate" : "2016-08-16",
      "value" : "LAST_N_DAYS:120"
    }, {
      "endDate" : "2016-12-19",
      "label" : "Next 7 Days",
      "startDate" : "2016-12-13",
      "value" : "NEXT_N_DAYS:7"
    }, {
      "endDate" : "2017-01-11",
      "label" : "Next 30 Days",
      "startDate" : "2016-12-13",
      "value" : "NEXT_N_DAYS:30"
```

```
    }, {
      "endDate" : "2017-02-10",
      "label" : "Next 60 Days",
      "startDate" : "2016-12-13",
      "value" : "NEXT_N_DAYS:60"
    }, {
      "endDate" : "2017-03-12",
      "label" : "Next 90 Days",
      "startDate" : "2016-12-13",
      "value" : "NEXT_N_DAYS:90"
    }, {
      "endDate" : "2017-04-11",
      "label" : "Next 120 Days",
      "startDate" : "2016-12-13",
      "value" : "NEXT_N_DAYS:120"
    } ]
  } ],
  "standardFilterInfos" : {
    "probability" : {
      "type" : "PICKLIST",
      "filterValues" : [ {
        "label" : "All",
        "name" : ">0"
      }, {
        "label" : "> 90%",
        "name" : "gt90"
      }, {
        "label" : "> 80%",
        "name" : "gt80"
      }, {
        "label" : "> 70%",
        "name" : "gt70"
      }, {
        "label" : "> 60%",
        "name" : "gt60"
      }, {
        "label" : "> 50%",
        "name" : "gt50"
      }, {
        "label" : "> 40%",
        "name" : "gt40"
      }, {
        "label" : "> 30%",
        "name" : "gt30"
      }, {
        "label" : "> 20%",
        "name" : "gt20"
      }, {
        "label" : "> 10%",
        "name" : "gt10"
      }, {
        "label" : "< 90%",
        "name" : "lt90"
      }, {
```

```
          "label" : "< 80%",
          "name" : "lt80"
        }, {
          "label" : "< 70%",
          "name" : "lt70"
        }, {
          "label" : "< 60%",
          "name" : "lt60"
        }, {
          "label" : "< 50%",
          "name" : "lt50"
        }, {
          "label" : "< 40%",
          "name" : "lt40"
        }, {
          "label" : "< 30%",
          "name" : "lt30"
        }, {
          "label" : "< 20%",
          "name" : "lt20"
        }, {
          "label" : "< 10%",
          "name" : "lt10"
        } ],
        "label" : "Probability"
      },
      "open" : {
        "type" : "PICKLIST",
        "filterValues" : [ {
          "label" : "Any",
          "name" : "all"
        }, {
          "label" : "Open",
          "name" : "open"
        }, {
          "label" : "Closed",
          "name" : "closed"
        }, {
          "label" : "Closed Won",
          "name" : "closedwon"
        } ],
        "label" : "Opportunity Status"
      }
    }
  }
}
```

Run Reports Synchronously or Asynchronously

Get summary data with or without details by running a report synchronously or asynchronously through the API. When you run a report, the API returns data for the same number of records that are available when the report is run in the Salesforce user interface.

Run a report synchronously if you expect it to finish running quickly. Otherwise, we recommend that you run reports through the API asynchronously for these reasons:

- Long running reports have a lower risk of reaching the timeout limit when run asynchronously.
- The 2-minute overall Salesforce API timeout limit doesn't apply to asynchronous runs.
- The Salesforce Reports and Dashboards REST API can handle a higher number of asynchronous run requests at a time.
- Since the results of an asynchronously run report are stored for a 24-hr rolling period, they're available for recurring access.

To run a report synchronously:

- Send a GET or POST request to the Execute Sync resource to get data.
- Use a POST request to get specific results on the fly by passing dynamic filters, groupings, and aggregates in the report metadata.

To fetch report data asynchronously:

1. Send a POST request to the Execute Async resource. If you're passing filters, include them in the POST request metadata. The request returns the instance ID where results of the run are stored.
2. Send a GET request to the Instance Results resource to fetch data using the instance ID.

Example of a synchronous report run

This GET request to the Execute Sync resource, `/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK?includeDetails=true`, for a synchronous run returns summary data with details.


```
{
  "attributes" : {
    "describeUrl" :
      "/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/describe",
    "instancesUrl" :
      "/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/instances",
    "reportId" :
      "00OR0000000K2UeMAK",
    "reportName" : "Deals Closing This Quarter",
    "type" : "Report"
  },
  "allData" : true,
  "factMap" : {
    "2!0_0" : {
      "aggregates" : [
        { "label" : "$16,000.01", "value" : 16000.0100000000002182787284255027770996093750
 },
        { "label" : "$16,000.01", "value" : 16000.0100000000002182787284255027770996093750
 },
        { "label" : "1", "value" : 1 } ],
      "rows" : [ {
        "dataCells" : [
          { "label" : "Acme - 200 Widgets", "value" : "006R00000023IDYIA2" },
          { "label" : "$16,000.01",
            "value" : { "amount" : 16000.01, "currency" : null } },
          { "label" : "Word of mouth", "value" : "Word of mouth" },
          { "label" : "Need estimate", "value" : "Need estimate" },
          { "label" : "60%", "value" : 60},
          { "label" : "Q3-2015", "value" : "Q3-2015" },
```

```
          { "label" : "12", "value" : 12 },
          { "label" : "7/31/2015", "value" : "2015-07-31" },
          { "label" : "Fred Wiliamson", "value" : "005R0000000Hv5rIAC" },
          { "label" : "-", "value" : null } ]
      } ]
    },
    "T!0" : {
      "aggregates" : [
        { "label" : "$32,021.01", "value" : 32021.009999999998399289324879646301269531 25
},
        { "label" : "$16,010.51", "value" : 16010.504999999999919964466243982315063476562 5
 },
        { "label" : "2", "value" : 2 } ],
      "rows" : [ ]
    },
...
     "T!T" : {
      "aggregates" : [
        { "label" : "$153,042.01", "value" : 153042.010000000009313225746154785156 25 },
        { "label" : "$25,507.00", "value" : 25507.001666666667006211355328559875488281 25
},
        { "label" : "6", "value" : 6 } ],
      "rows" : [ ]
    },
...
  "groupingsAcross" : {
    "groupings" : [
      {
        "groupings" : [
          { "groupings" : [ ], "key" : "0_0", "label" : "Existing Business", "value" :
"Existing Business" } ],
        "key" : "0",
        "label" : "July 2015",
        "value" : "2015-07-01"
      },
      {
        "groupings" : [
          { "groupings" : [ ], "key" : "1_0", "label" : "Existing Business", "value" :
"Existing Business" },
          { "groupings" : [ ], "key" : "1_1", "label" : "New Business", "value" : "New
Business" } ],
        "key" : "1",
        "label" : "August 2015",
        "value" : "2015-08-01"
      },
      {
        "groupings" : [
          { "groupings" : [ ], "key" : "2_0", "label" : "Existing Business", "value" :
"Existing Business" } ],
        "key" : "2",
        "label" : "September 2015",
        "value" : "2015-09-01"
      }
    ]
```

```
  },
  "groupingsDown" : {
    "groupings" : [
      { "groupings" : [ ], "key" : "0", "label" : "Acme", "value" : "001R0000002GuzsIAC"
},
     { "groupings" : [ ], "key" : "1", "label" : "Facebook", "value" : "001R0000001nUAmIAM"
 },
      { "groupings" : [ ], "key" : "2", "label" : "Home Depot", "value" :
"001R0000002Gv5zIAC" },
     { "groupings" : [ ], "key" : "3", "label" : "Mircosoft", "value" : "001R0000002Gv5QIAS"
 } ]
  },
  "hasDetailRows" : true,
  "reportExtendedMetadata" : {
    "aggregateColumnInfo" : {
      "s!AMOUNT" : {
        "acrossGroupingContext" : null,
        "dataType" : "currency",
        "downGroupingContext" : null,
        "label" : "Sum of Amount" },
      "a!AMOUNT" : {
        "acrossGroupingContext" : null,
        "dataType" : "currency",
        "downGroupingContext" : null,
        "label" : "Average Amount" },
      "RowCount" : {
        "acrossGroupingContext" : null,
        "dataType" : "int",
        "downGroupingContext" : null,
        "label" : "Record Count" }
    },
    "detailColumnInfo" : {
      "OPPORTUNITY_NAME" : { "dataType" : "string", "label" : "Opportunity Name" },

      "AMOUNT" : { "dataType" : "currency", "label" : "Amount" },
      "LEAD_SOURCE" : { "dataType" : "picklist", "label" : "Lead Source" },
      "NEXT_STEP" : { "dataType" : "string", "label" : "Next Step" },
      "PROBABILITY" : { "dataType" : "percent", "label" : "Probability (%)" },
      "FISCAL_QUARTER" : { "dataType" : "string", "label" : "Fiscal Period" },
      "AGE" : { "dataType" : "int", "label" : "Age" },
      "CREATED_DATE" : { "dataType" : "datetime", "label" : "Created Date" },
      "FULL_NAME" : { "dataType" : "string", "label" : "Opportunity Owner" },
      "ROLLUP_DESCRIPTION" : { "dataType" : "string", "label" : "Owner Role" }
    },
    "groupingColumnInfo" : {
      "ACCOUNT_NAME" : { "dataType" : "string", "groupingLevel" : 0, "label" : "Account
Name" },
      "CLOSE_DATE" : { "dataType" : "date", "groupingLevel" : 0, "label" : "Close Date"
},
      "TYPE" : { "dataType" : "picklist", "groupingLevel" : 1, "label" : "Type" }
    }
  },
  "reportMetadata" : {
    "aggregates" : [ "s!AMOUNT", "a!AMOUNT", "RowCount" ],
```

```
    "chart" : {
      "chartType" : "Donut",
      "groupings" : [ "CLOSE_DATE" ],
      "hasLegend" : true,
      "showChartValues" : false,
      "summaries" : [ "s!AMOUNT" ],
      "summaryAxisLocations" : [ "Y" ],
      "title" : "Pipeline by Stage and Type"
    },
    "currency" : null,
    "description" : null,
    "detailColumns" : [ "OPPORTUNITY_NAME", "AMOUNT", "LEAD_SOURCE","NEXT_STEP",
      "PROBABILITY", "FISCAL_QUARTER", "AGE", "CREATED_DATE", "FULL_NAME",
"ROLLUP_DESCRIPTION" ],
    "developerName" : "Deals_Closing_This_Quarter",
    "division" : null,
    "folderId" : "00lR0000000M8IiIAK",
    "groupingsAcross" : [
      { "dateGranularity" : "Month", "name" : "CLOSE_DATE", "sortAggregate" : null,
"sortOrder" : "Asc"},
      { "dateGranularity" : "None", "name" : "TYPE", "sortAggregate" : null, "sortOrder"
: "Asc" } ],
    "groupingsDown" : [
      { "dateGranularity" : "None", "name" : "ACCOUNT_NAME", "sortAggregate" : null,
"sortOrder" : "Asc" } ],
    "hasDetailRows" : true,
    "hasRecordCount" : true,
    "historicalSnapshotDates" : [ ],
    "id" : "00OR0000000K2UeMAK",
    "name" : "Deals Closing This Quarter",
    "reportBooleanFilter" : null,
    "reportFilters" : [
     { "column" : "BucketField_36625466", "isRunPageEditable" : true, "operator" : "equals",
 "value" : "Early,Late" },
      { "column" : "TYPE", "isRunPageEditable" : true, "operator" : "equals", "value" :
"Existing Business,New Business" } ],
    "reportFormat" : "MATRIX",
    "reportType" : { "label" : "Opportunities", "type" : "Opportunity" },
    "scope" : "organization",
    "showGrandTotal" : true,
    "showSubtotals" : true,
    "sortBy" : [ ],
    "standardDateFilter" : {
      "column" : "CLOSE_DATE",
      "durationValue" : "THIS_FISCAL_QUARTER",
      "endDate" : "2015-09-30",
      "startDate" : "2015-07-01" },
    "standardFilters" : [
      { "name" : "open", "value" : "all" },
      { "name" : "probability", "value" : ">0" } ]
  }
}
```

Example of an asynchronous report run

1. This is a POST request (an empty request body), `/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/instances`, to the Execute Async resource for an asynchronous run requesting summary results.

```
{}
```

The response to the POST request returns the instance handle that stores the summary results of the run.

```
{
  "completionDate" : null,
  "hasDetailRows" : true,
  "id" : "0LGR00000000He3OAE",
  "ownerId" : "005R0000000Hv5rIAC",
  "queryable" : false,
  "requestDate" : "2015-08-12T16:05:43Z",
  "status" : "New",
  "url" :
"/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/instances/0LGR00000000He3OAE"
}
```

2. A GET request, `/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/instances/0LGR00000000He3OAE`, to the Instance Results resource for the instance handle fetches the report results.

```
{
  "attributes" : {
    "completionDate" : "2015-08-12T16:05:44Z",
    "id" : "0LGR00000000He3OAE",
    "ownerId" : "005R0000000Hv5rIAC",
    "queryable" : false,
    "reportId" : "00OR0000000K2UeMAK",
    "reportName" : "Deals Closing This Quarter",
    "requestDate" : "2015-08-12T16:05:43Z",
    "status" : "Success",
    "type" : "ReportInstance" },
  "allData" : true,
  "factMap" : {
    "2!0_0" : {
      "aggregates" : [
       { "label" : "$16,000.01", "value" : 16000.0100000000002182787284255027770996093750
 },
       { "label" : "$16,000.01", "value" : 16000.0100000000002182787284255027770996093750
 },
        { "label" : "1", "value" : 1 } ],
      "rows" : [ {
        "dataCells" : [
          { "label" : "Acme - 200 Widgets", "value" : "006R00000023IDYIA2" },
          { "label" : "$16,000.01",
            "value" : { "amount" : 16000.01,
            "currency" : null } },
          { "label" : "Word of mouth", "value" : "Word of mouth" },
          { "label" : "Need estimate", "value" : "Need estimate" },
          { "label" : "60%", "value" : 60 },
```

```
          { "label" : "Q3-2015", "value" : "Q3-2015" },
          { "label" : "12", "value" : 12 },
          { "label" : "7/31/2015", "value" : "2015-07-31" },
          { "label" : "Fred Wiliamson", "value" : "005R0000000Hv5rIAC" },
          { "label" : "-", "value" : null } ]
        } ]
    },
...
  "groupingsAcross" : {
    "groupings" : [
...
    ]
  },
  "groupingsDown" : {
    "groupings" : [
...
    ]
  },
  "hasDetailRows" : true,
  "reportExtendedMetadata" : {
    "aggregateColumnInfo" : {
      "s!AMOUNT" : {
        "acrossGroupingContext" : null,
        "dataType" : "currency",
        "downGroupingContext" : null,
        "label" : "Sum of Amount" },
      "a!AMOUNT" : {
        "acrossGroupingContext" : null,
        "dataType" : "currency",
        "downGroupingContext" : null,
        "label" : "Average Amount" },
      "RowCount" : {
        "acrossGroupingContext" : null,
        "dataType" : "int",
        "downGroupingContext" : null,
        "label" : "Record Count" }
    },
    "detailColumnInfo" :
      { "OPPORTUNITY_NAME" : { "dataType" : "string", "label" : "Opportunity Name" },

        "AMOUNT" : { "dataType" : "currency", "label" : "Amount"},
        "LEAD_SOURCE" : { "dataType" : "picklist", "label" : "Lead Source"  },
        "NEXT_STEP" : { "dataType" : "string", "label" : "Next Step" },
        "PROBABILITY" : { "dataType" : "percent", "label" : "Probability (%)" },

        "FISCAL_QUARTER" : { "dataType" : "string", "label" : "Fiscal Period" },

        "AGE" : { "dataType" : "int", "label" : "Age" },
        "CREATED_DATE" : { "dataType" : "datetime", "label" : "Created Date" },
        "FULL_NAME" : { "dataType" : "string", "label" : "Opportunity Owner" },
        "ROLLUP_DESCRIPTION" : { "dataType" : "string", "label" : "Owner Role" } },
    "groupingColumnInfo" : {
      "ACCOUNT_NAME" : { "dataType" : "string", "groupingLevel" : 0, "label" : "Account
 Name" },
```

```
      "CLOSE_DATE" : { "dataType" : "date", "groupingLevel" : 0, "label" : "Close Date"
 },
      "TYPE" : { "dataType" : "picklist", "groupingLevel" : 1, "label" : "Type" }}
  },
  "reportMetadata" : {
    "aggregates" : [ "s!AMOUNT", "a!AMOUNT", "RowCount" ],
    "chart" : {
      "chartType" : "Donut",
      "groupings" : [ "CLOSE_DATE" ],
      "hasLegend" : true,
      "showChartValues" : false,
      "summaries" : [ "s!AMOUNT" ],
      "summaryAxisLocations" : [ "Y" ],
      "title" : "Pipeline by Stage and Type" },
    "currency" : null,
    "description" : null,
    "detailColumns" : [ "OPPORTUNITY_NAME", "AMOUNT", "LEAD_SOURCE", "NEXT_STEP",
"PROBABILITY",
      "FISCAL_QUARTER", "AGE", "CREATED_DATE", "FULL_NAME", "ROLLUP_DESCRIPTION" ],

    "developerName" : "Deals_Closing_This_Quarter",
    "division" : null,
    "folderId" : "00lR0000000M8IiIAK",
    "groupingsAcross" : [
      { "dateGranularity" : "Month", "name" : "CLOSE_DATE", "sortAggregate" : null,
"sortOrder" : "Asc" },
     { "dateGranularity" : "None", "name" : "TYPE", "sortAggregate" : null, "sortOrder"
 : "Asc" } ],
    "groupingsDown" : [
      { "dateGranularity" : "None", "name" : "ACCOUNT_NAME", "sortAggregate" : null,
"sortOrder" : "Asc" } ],
    "hasDetailRows" : true,
    "hasRecordCount" : true,
    "historicalSnapshotDates" : [ ],
    "id" : "00OR0000000K2UeMAK",
    "name" : "Deals Closing This Quarter",
    "reportBooleanFilter" : null,
    "reportFilters" : [
      { "column" : "BucketField_36625466", "isRunPageEditable" : false, "operator" :
"equals", "value" : "Early,Late" },
      { "column" : "TYPE", "isRunPageEditable" : false, "operator" : "equals", "value"
 : "Existing Business,New Business" } ],
    "reportFormat" : "MATRIX",
    "reportType" : { "label" : "Opportunities", "type" : "Opportunity" },
    "scope" : "organization",
    "showGrandTotal" : true,
    "showSubtotals" : true,
    "sortBy" : [ ],
    "standardDateFilter" : {
      "column" : "CLOSE_DATE",
      "durationValue" : "THIS_FISCAL_QUARTER",
      "endDate" : "2015-09-30",
      "startDate" : "2015-07-01" },
    "standardFilters" : [
```

```
      { "name" : "open", "value" : "all" },
      { "name" : "probability", "value" : ">0" } ]
  }
}
```

SEE ALSO:

- Execute Sync
- Instances List
- Instance Results

Get Report Metadata

Report metadata gives information about a report and its report type. It includes information on fields used in the report for filters, groupings, detailed data, and summaries. You can use the metadata to do several things.

- Find out what fields in the report type you can filter on and by what values.
- Build custom chart visualizations using the metadata information on fields, groupings, detailed data, and summaries.
- Change filters in the report metadata during a report run.

To get report metadata, send a GET request to the Describe resource.

Example

This GET request, `/services/data/v29.0/analytics/reports/00OD0000001ZbP7MAK/describe`, to the Describe resource returns metadata for a matrix report. This includes a bucket field, groupings, summaries, and a custom summary formula.

```
{
    "reportTypeMetadata": {
        "categories": [
            {
                "label": "Opportunity Information",
                "columns": {
                    "CREATED": {
                        "filterValues": [],
                        "label": "Created By",
                        "dataType": "string",
                        "filterable": true
                    },
...
                    "TYPE": {
                        "filterValues": [
                            {
                                "name": "Add-On Business",
                                "label": "Add-On Business"
                            },
                            {
                                "name": "New Business",
                                "label": "New Business"
                            },
                            {
                                "name": "Services",
```

```
                                "label": "Services"
                            }
                        ],
                        "label": "Type",
                        "dataType": "picklist",
                        "filterable": true
                    },
        }
...
    },
    "reportExtendedMetadata": {
        "detailColumnInfo": {
            "OPPORTUNITY_NAME": {
                "label": "Opportunity Name",
                "dataType": "string"
            },
            "PROBABILITY": {
                "label": "Probability (%)",
                "dataType": "percent"
            },
            "EXP_AMOUNT": {
                "label": "Expected Revenue",
                "dataType": "currency"
            },
            "NEXT_STEP": {
                "label": "Next Step",
                "dataType": "string"
            },
            "BucketField_34840671": {
                "label": "Industry",
                "dataType": "string"
            }
        },
        "aggregateColumnInfo": {
            "RowCount": {
                "label": "Record Count",
                "dataType": "int",
                "downGroupingContext": null,
                "acrossGroupingContext": null
            },
            "FORMULA1": {
                "label": "formula1",
                "dataType": "double",
                "downGroupingContext": "ALL_SUMMARY_LEVELS",
                "acrossGroupingContext": "ALL_SUMMARY_LEVELS"
            },
            "s!EXP_AMOUNT": {
                "label": "Sum of Expected Revenue",
                "dataType": "currency",
                "downGroupingContext": null,
                "acrossGroupingContext": null
            }
        },
        "groupingColumnInfo": {
```

```
            "CLOSE_DATE": {
                "label": "Close Date",
                "dataType": "date",
                "groupingLevel": 1
            },
            "STAGE_NAME": {
                "label": "Stage",
                "dataType": "picklist",
                "groupingLevel": 0
            },
            "ACCOUNT_NAME": {
                "label": "Account Name",
                "dataType": "string",
                "groupingLevel": 0
            },
            "ACCOUNT_LAST_ACTIVITY": {
                "label": "Account: Last Activity",
                "dataType": "date",
                "groupingLevel": 1
            }
        }
    },
    "reportMetadata": {
        "name": "Stuck Opportunities",
        "id": "00OD0000001ZbP7MAK",
        "currency": null,
        "developerName": "StuckOpportunities",
        "groupingsDown": [
            {
                "name": "ACCOUNT_NAME",
                "sortOrder": "Asc",
                "dateGranularity": "None"
            },
            {
                "name": "CLOSE_DATE",
                "sortOrder": "Desc",
                "dateGranularity": "FiscalQuarter"
            }
        ],
        "groupingsAcross": [
            {
                "name": "STAGE_NAME",
                "sortOrder": "Desc",
                "dateGranularity": "None"
            },
            {
                "name": "ACCOUNT_LAST_ACTIVITY",
                "sortOrder": "Asc",
                "dateGranularity": "Week"
            }
        ],
        "reportType": {
            "type": "Opportunity",
            "label": "Opportunities"
```

```
        },
        "aggregates": [
            "s!EXP_AMOUNT",
            "FORMULA1",
            "RowCount"
        ],
        "reportFormat": "MATRIX",
        "reportBooleanFilter": null,
        "reportFilters": [
            {
                "value": "Closed Won,Closed Lost",
                "column": "STAGE_NAME",
                "operator": "notEqual"
            },
            {
                "value": "50",
                "column": "PROBABILITY",
                "operator": "greaterThan"
            }
        ],
        "detailColumns": [
            "OPPORTUNITY_NAME",
            "PROBABILITY",
            "EXP_AMOUNT",
            "NEXT_STEP",
            "BucketField_34840671"
        ]
    }
}
```

SEE ALSO:

Describe

Get a List of Report Types

Return a list of analytics notifications using a GET request.

Use a GET request on the Report Type List resource to return a list of report types.

Example Usage

```
/services/data/v39.0/analytics/reportTypes
```

Example Response Body

```
[ {
  "label" : "Accounts & Contacts",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountList",
    "label" : "Accounts",
    "type" : "AccountList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContactList",
    "label" : "Contacts & Accounts",
    "type" : "ContactList"
```

```
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountPartner",
    "label" : "Accounts with Partners",
    "type" : "AccountPartner"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountTeam",
    "label" : "Account with Account Teams",
    "type" : "AccountTeam"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountContactRole",
    "label" : "Accounts with Contact Roles",
    "type" : "AccountContactRole"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountAsset",
    "label" : "Accounts with Assets",
    "type" : "AccountAsset"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContactAsset",
    "label" : "Contacts with Assets",
    "type" : "ContactAsset"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountAuditHistory",
    "label" : "Account History",
    "type" : "AccountAuditHistory"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContactAuditHistory",
    "label" : "Contact History",
    "type" : "ContactAuditHistory"
  } ]
}, {
  "label" : "Opportunities",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/Opportunity",
    "label" : "Opportunities",
    "type" : "Opportunity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityProduct",
    "label" : "Opportunities with Products",
    "type" : "OpportunityProduct"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityContact",
    "label" : "Opportunities with Contact Roles",
    "type" : "OpportunityContact"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityPartner",
    "label" : "Opportunities with Partners",
    "type" : "OpportunityPartner"
  }, {
   "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityCompetitor",

    "label" : "Opportunities with Competitors",
    "type" : "OpportunityCompetitor"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityHistory",
```

```
    "label" : "Opportunity History",
    "type" : "OpportunityHistory"
  }, {
    "describeUrl" :
"/services/data/v39.0/analytics/reportTypes/OpportunityFieldAuditHistory",
    "label" : "Opportunity Field History",
    "type" : "OpportunityFieldAuditHistory"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityTrend",
    "label" : "Opportunity Trends",
    "type" : "OpportunityTrend"
  }, {
    "describeUrl" :
"/services/data/v39.0/analytics/reportTypes/OpportunityContactProduct",
    "label" : "Opportunities with Contact Roles and Products",
    "type" : "OpportunityContactProduct"
  } ]
}, {
  "label" : "Customer Support Reports",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseList",
    "label" : "Cases",
    "type" : "CaseList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseHistory",
    "label" : "Case Lifecycle",
    "type" : "CaseHistory"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseContactRole",
    "label" : "Cases with Contact Roles",
    "type" : "CaseContactRole"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseAsset",
    "label" : "Cases with Assets",
    "type" : "CaseAsset"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseSolution",
    "label" : "Cases with Solutions",
    "type" : "CaseSolution"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseAuditHistory",
    "label" : "Case History",
    "type" : "CaseAuditHistory"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/SolutionList",
    "label" : "Solutions",
    "type" : "SolutionList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/SolutionCategory",
    "label" : "Solution Categories",
    "type" : "SolutionCategory"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/SolutionAuditHistory",
    "label" : "Solution History",
```

```
    "type" : "SolutionAuditHistory"
  } ]
}, {
  "label" : "Leads",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/LeadList",
    "label" : "Leads",
    "type" : "LeadList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityLead",
    "label" : "Leads with converted lead information",
    "type" : "OpportunityLead"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/LeadAuditHistory",
    "label" : "Lead History",
    "type" : "LeadAuditHistory"
  } ]
}, {
  "label" : "Activities",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/Activity",
    "label" : "Tasks and Events",
    "type" : "Activity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/EventAttendee",
    "label" : "Events with Invitees",
    "type" : "EventAttendee"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/EmailStatus",
    "label" : "HTML Email Status",
    "type" : "EmailStatus"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AccountActivity",
    "label" : "Activities with Accounts",
    "type" : "AccountActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContactActivity",
    "label" : "Activities with Contacts",
    "type" : "ContactActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OpportunityActivity",
    "label" : "Activities with Opportunities",
    "type" : "OpportunityActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/LeadActivity",
    "label" : "Activities with Leads",
    "type" : "LeadActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CaseActivity",
    "label" : "Activities with Cases",
    "type" : "CaseActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/SolutionActivity",
    "label" : "Activities with Solutions",
```

```
    "type" : "SolutionActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContractActivity",
    "label" : "Activities with Contracts",
    "type" : "ContractActivity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ProductActivity",
    "label" : "Activities with Products",
    "type" : "ProductActivity"
  } ]
}, {
  "label" : "Contracts and Orders",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContractList",
    "label" : "Contracts",
    "type" : "ContractList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContractAuditHistory",
    "label" : "Contract History",
    "type" : "ContractAuditHistory"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContractOrder",
    "label" : "Contracts with Orders",
    "type" : "ContractOrder"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContractOrderItem",
    "label" : "Contracts with Orders and Products",
    "type" : "ContractOrderItem"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ContractContactRole",
    "label" : "Contracts with Contact Roles",
    "type" : "ContractContactRole"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OrderList",
    "label" : "Orders",
    "type" : "OrderList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OrderItemList",
    "label" : "Orders with Products",
    "type" : "OrderItemList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/OrderAuditHistory",
    "label" : "Order History",
    "type" : "OrderAuditHistory"
  } ]
}, {
  "label" : "Price Books, Products and Assets",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ProductList",
    "label" : "Products",
    "type" : "ProductList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ProductOpportunity",
    "label" : "Products with Opportunities",
```

```
    "type" : "ProductOpportunity"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/PricebookProduct",
    "label" : "Price Books with Products",
    "type" : "PricebookProduct"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ProductAsset",
    "label" : "Products with Assets",
    "type" : "ProductAsset"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AssetWithProduct",
    "label" : "Assets",
    "type" : "AssetWithProduct"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/AssetCase",
    "label" : "Assets with Cases",
    "type" : "AssetCase"
  } ]
}, {
  "label" : "Administrative Reports",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/User",
    "label" : "Users",
    "type" : "User"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/ReportList",
    "label" : "Reports",
    "type" : "ReportList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/DocumentList",
    "label" : "Documents",
    "type" : "DocumentList"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/LoginIpEmail",
    "label" : "New Login Locations",
    "type" : "LoginIpEmail"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/TwoFactorMethodsInfo",
    "label" : "Identity Verification Methods",
    "type" : "TwoFactorMethodsInfo"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CollabGroup",
    "label" : "Collaboration Group Report",
    "type" : "CollabGroup"
  }, {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/CollabGroupFeedPosts",
    "label" : "Collaboration Group Feed Posts Report",
    "type" : "CollabGroupFeedPosts"
  } ]
}, {
  "label" : "File and Content Reports",
  "reportTypes" : [ {
    "describeUrl" : "/services/data/v39.0/analytics/reportTypes/File",
    "label" : "File and Content Report",
```

```
    "type" : "File"
  } ]
} ]
```

Download Formatted Excel Reports Using the Reports REST API

You can use the Reports REST API to request reports in printer-friendly Excel format.

To execute a report and obtain the results, the Salesforce Lightning Report Builder issues a REST request to the Analytics API. The API is a POST to the endpoint `/services/data/vXX.x/analytics/reports/<reportId>`.

After the report is created, use a `GET` request to obtain the results. By default, results are returned in JSON format, which the Report Run page renders. This format is specified in the Accept header information.

Request Excel Output

Note: This endpoint isn't designed for concurrent export of large formatted reports. To avoid impact on overall system load, don't run more than one large report export at a time.

To request Excel instead of JSON format, change the Accept value in the request header to `application/vnd.openxmlformats-officedocument.spreadsheetml.sheet`.

Now when you execute a `GET` request, the Excel file is created. The raw response includes the Excel filename, as shown in bold in the following example. You can add code to your application to download the file from the response stream.

```
Raw Response
HTTP/1.1 200 OK
Date: Wed, 06 Jun 2018 17:23:58 GMT
Strict-Transport-Security: max-age=31536000; includeSubDomains
X-Content-Type-Options: nosniff
X-XSS-Protection: 1; mode=block
Content-Security-Policy: upgrade-insecure-requests
Cache-Control: no-cache,must-revalidate,max-age=0,no-store,private
Set-Cookie: BrowserId=YJXhUq42SRyZ3hhgDPFxog;Path=/;Domain=.salesforce.com;Expires=Sun,
05-Aug-2018 17:23:58 GMT;Max-Age=5184000
Expires: Thu, 01 Jan 1970 00:00:00 GMT
Sforce-Limit-Info: api-usage=4/15000
Content-Type: application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
Content-Disposition: attachment; filename="New Opportunities Report-2018-05-06-10-23-59.xlsx"
Transfer-Encoding: chunked
```

List Asynchronous Runs of a Report

You can get as many as 2000 instances of a report for which you requested asynchronous runs by sending a GET request to the Instances List resource. The instance list is sorted by the date when the run was requested. Report results are stored for a rolling 24-hour period. During this time, based on your user access level, you can access results for each instance of the report that was run.

Example

A GET request, `/services/data/v29.0/analytics/reports/00OD0000001ZbP7MAK/instances`, to the Instances List resource returns two instances of the report that was run asynchronously. Each URL handle stores report results for that instance.

```
[
    {
        "id": "0LGD000000000IyOAI",
        "requestDate": "2013-08-12T19:06:47Z",
        "status": "Success",
        "url":
"/services/data/v29.0/analytics/reports/00OD0000001ZbP7MAK/instances/0LGD000000000IyOAI",

        "ownerId": "005D0000001KvxRIAS",
        "queryable" : false,
        "hasDetailRows": false,
        "completionDate": "2013-08-12T19:06:48Z"
    },
    {
        "id": "0LGD000000000IjOAI",
        "requestDate": "2013-08-12T18:39:06Z",
        "status": "Success",
        "url":
"/services/data/v29.0/analytics/reports/00OD0000001ZbP7MAK/instances/0LGD000000000IjOAI",

        "ownerId": "005D0000001KvxRIAS",
        "queryable" : false,
        "hasDetailRows": false,
        "completionDate": "2013-08-12T18:39:07Z"
    }
]
```

SEE ALSO:

Instances List

Filter Reports on Demand

To get specific results on the fly, filter reports through the API. Filter changes made through the API does not affect the source report definition. Using the API, you can filter with up to 20 custom field filters and add filter logic (such as AND, OR). But standard filters (such as range), filtering by row limit, and cross filters are unavailable.

Before you filter a report, it's helpful to check these properties in the metadata that tell you if a field can be filtered, the values and criteria you can filter by, and filters that already exist in the report.

- `filterable`
- `filterValues`
- `dataTypeFilterOperatorMap`
- `reportFilters`

You can filter reports during synchronous or asynchronous report runs by making a POST request to the Execute Sync or Execute Async resource.

Example

In a POST request, an accounts report is filtered synchronously by these passing filters with filter logic in the metadata to the Execute Sync resource.

1. `Account Name` not equal to Data Mart
2. `Account Owner` not equal to Admin User
3. `Annual Revenue` greater than "100,000"
4. `Industry` not equal to Manufacturing,Recreation

Filter logic: (1 OR 4) AND 2 AND 3.

```
{
    "reportMetadata": {
        "name": "FilterAcctsReport",
        "id": "00OD0000001cw27MAA",
        "reportFormat": "SUMMARY",
        "reportBooleanFilter": "(1OR4)AND2AND3",
        "reportFilters": [
            {
                "value": "DataMart",
                "operator": "notEqual",
                "column": "ACCOUNT.NAME"
            },
            {
                "value": "AdminUser",
                "operator": "notEqual",
                "column": "USERS.NAME"
            },
            {
                "value": "\"100,000\"",
                "operator": "greaterThan",
                "column": "SALES"
            },
            {
                "value": "Manufacturing,Recreation",
                "operator": "notEqual",
                "column": "INDUSTRY"
            }
        ],
        "detailColumns": [
            "RATING",
            "LAST_UPDATE",
            "SALES"
        ],
        "developerName": "Filter_Accts_Report",
        "reportType": {
            "type": "AccountList",
            "label": "Accounts"
        },
        "currency": null,
        "aggregates": [
            "s!SALES",
            "RowCount"
```

```
        ],
        "groupingsDown": [
            {
                "name": "USERS.NAME",
                "sortAggregate": "s!SALES",
                "sortOrder": "Desc",
                "dateGranularity": "None"
            },
            {
                "name": "ACCOUNT.NAME",
                "sortAggregate": null,
                "sortOrder": "Asc",
                "dateGranularity": "None"
            },
            {
                "name": "DUE_DATE",
                "sortAggregate": null,
                "sortOrder": "Asc",
                "dateGranularity": "Month"
            }
        ],
        "groupingsAcross": []
    }
}
```

In response to the POST request, the report returns data that meets the given criteria.

```
{
    "hasDetailRows": false,
    "attributes": {
       "describeUrl": "/services/data/v29.0/analytics/reports/00OD0000001cw27MAA/describe",

        "instancesUrl":
"/services/data/v29.0/analytics/reports/00OD0000001cw27MAA/instances",
        "type": "Report",
        "reportName": "Filter Accts Report",
        "reportId": "00OD0000001cw27MAA"
    },
    "factMap": {
        "1_0!T": {
            "aggregates": [
                {
                    "value": 56000000,
                    "label": "$56,000,000"
                },
                {
                    "value": 1,
                    "label": "1"
                }
            ]
        },
        "7_1!T": {
            "aggregates": [
                {
                    "value": 24000000,
```

```
                    "label": "$24,000,000"
                },
                {
                    "value": 1,
                    "label": "1"
                }
            ]
        },
...
    "allData": true,
    "reportMetadata": {
        "name": "Filter Accts Report",
        "id": "00OD0000001cw27MAA",
        "reportFormat": "SUMMARY",
        "reportBooleanFilter": "(1 OR 4) AND 2 AND 3",
        "reportFilters": [
            {
                "value": "Data Mart",
                "operator": "notEqual",
                "column": "ACCOUNT.NAME"
            },
            {
                "value": "Admin User",
                "operator": "notEqual",
                "column": "USERS.NAME"
            },
            {
                "value": "\"100,000\"",
                "operator": "greaterThan",
                "column": "SALES"
            },
            {
                "value": "Manufacturing,Recreation",
                "operator": "notEqual",
                "column": "INDUSTRY"
            }
        ],
        "detailColumns": [
            "RATING",
            "LAST_UPDATE",
            "SALES"
        ],
...
    }
}
```


SEE ALSO:

Execute Sync

List Recently Viewed Reports

Get up to 200 of the reports you most recently viewed in Salesforce by sending a GET request to the Report List resource.

Each report listing in the response has resource URLs to get metadata and run a report asynchronously or synchronously.

For a more extensive reports list, query the Report object using a SOQL query in a Salesforce API such as SOAP API or REST API. This SOQL query, for example, returns all reports that are in matrix format: `SELECT Description,Format,LastRunDate FROM Report WHERE Format = 'MATRIX' ORDER BY Id ASC NULLS FIRST`

Example

This GET request `/services/data/v35.0/analytics/reports` to the Report List resource returns a list of 5 recently viewed reports.


```
[
  {
    "describeUrl" : "/services/data/v35.0/analytics/reports/00OR0000000K2OmMAK/describe",

    "id" : "00OR0000000K2OmMAK",
   "instancesUrl" : "/services/data/v35.0/analytics/reports/00OR0000000K2OmMAK/instances",

    "name" : "Pipeline By Industry",
    "url" : "/services/data/v35.0/analytics/reports/00OR0000000K2OmMAK" },
  {
    "describeUrl" : "/services/data/v35.0/analytics/reports/00OR0000000OFXeMAO/describe",

    "id" : "00OR0000000OFXeMAO",
   "instancesUrl" : "/services/data/v35.0/analytics/reports/00OR0000000OFXeMAO/instances",

    "name" : "My Open Pipeline",
    "url" : "/services/data/v35.0/analytics/reports/00OR0000000OFXeMAO" },
  {
    "describeUrl" : "/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/describe",

    "id" : "00OR0000000K2UeMAK",
   "instancesUrl" : "/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK/instances",

    "name" : "Deals Closing This Quarter",
    "url" : "/services/data/v35.0/analytics/reports/00OR0000000K2UeMAK" },
  {
    "describeUrl" : "/services/data/v35.0/analytics/reports/00OR0000000OFHoMAO/describe",

    "id" : "00OR0000000OFHoMAO",
   "instancesUrl" : "/services/data/v35.0/analytics/reports/00OR0000000OFHoMAO/instances",

    "name" : "Sample Report: # of Opportunities",
    "url" : "/services/data/v35.0/analytics/reports/00OR0000000OFHoMAO" },
  {
    "describeUrl" : "/services/data/v35.0/analytics/reports/00OR0000000JdVOMA0/describe",

    "id" : "00OR0000000JdVOMA0",
   "instancesUrl" : "/services/data/v35.0/analytics/reports/00OR0000000JdVOMA0/instances",

    "name" : "My Leads rpt",
```

```
    "url" : "/services/data/v35.0/analytics/reports/00OR0000000JdVOMA0" }
]
```

SEE ALSO:

Report List

Decode the Fact Map

Depending on how you run a report, the fact map in the report results can contain values for only summary or both summary and detailed data. The fact map values are expressed as keys, which you can programmatically use to visualize the report data. Fact map keys provide an index into each section of a fact map, from which you can access summary and detailed data.

The pattern for the fact map keys varies by report format as shown in this table.

Report format	Fact map key pattern
Tabular	`T!T`: The grand total of a report. Both record data values and the grand total are represented by this key.
Summary	***<First level row grouping_second level row grouping_third level row grouping>***`!T`: T refers to the row grand total.
Matrix	***<First level row grouping_second level row grouping>!<First level column grouping_second level column grouping>***.

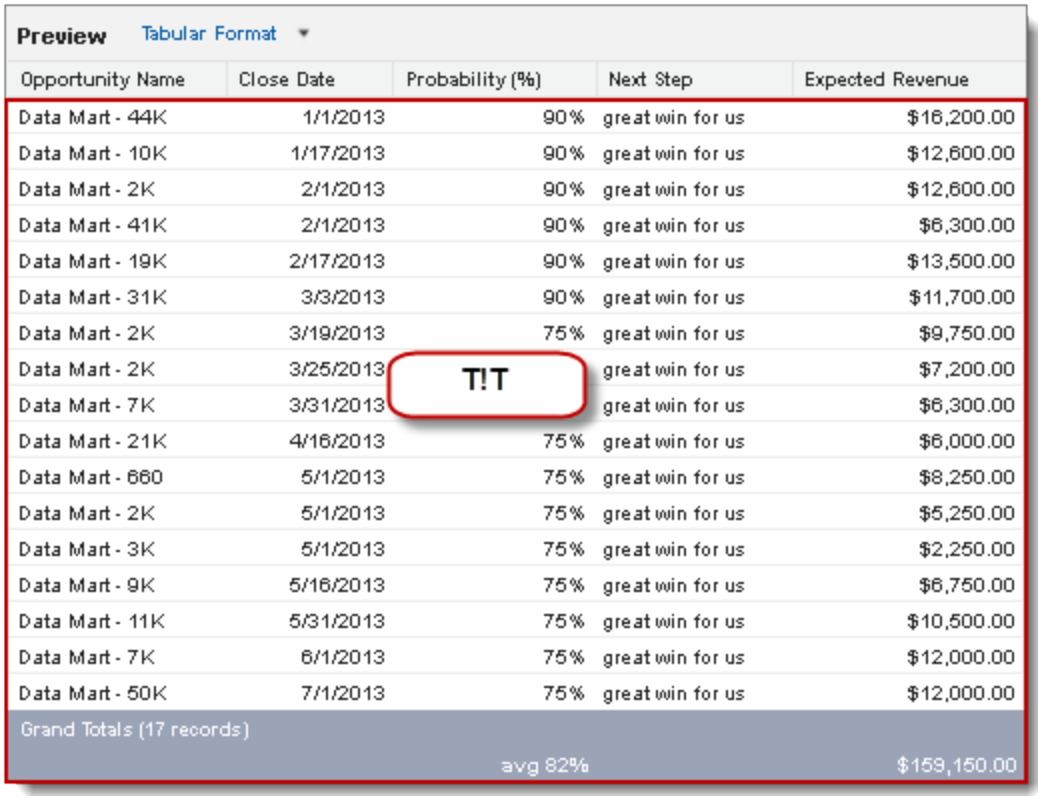
Each item in a row or column grouping is numbered starting with `0`. Here are some examples of fact map keys:

Fact Map Key	Description
`0!T`	The first item in the first-level grouping.
`1!T`	The second item in the first-level grouping.
`0_0!T`	The first item in the first-level grouping and the first item in the second-level grouping.
`0_1!T`	The first item in the first-level grouping and the second item in the second-level grouping.

Let's look at examples of how fact map keys represent data as it appears in a Salesforce tabular, summary, or matrix report.

Tabular Report Fact Map

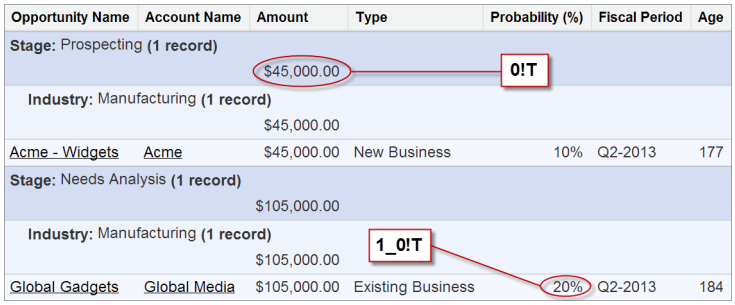
Here's an example of an opportunities report in tabular format. Since tabular reports don't have groupings, all of the record level data and summaries are expressed by the `T!T` key, which refers to the grand total.



Opportunity Name	Close Date	Probability (%)	Next Step	Expected Revenue
Data Mart - 44K	1/1/2013	90%	great win for us	$16,200.00
Data Mart - 10K	1/17/2013	90%	great win for us	$12,600.00
Data Mart - 2K	2/1/2013	90%	great win for us	$12,600.00
Data Mart - 41K	2/1/2013	90%	great win for us	$6,300.00
Data Mart - 19K	2/17/2013	90%	great win for us	$13,500.00
Data Mart - 31K	3/3/2013	90%	great win for us	$11,700.00
Data Mart - 2K	3/19/2013	75%	great win for us	$9,750.00
Data Mart - 2K	3/25/2013	75%	great win for us	$7,200.00
Data Mart - 7K	3/31/2013	75%	great win for us	$6,300.00
Data Mart - 21K	4/16/2013	75%	great win for us	$6,000.00
Data Mart - 660	5/1/2013	75%	great win for us	$8,250.00
Data Mart - 2K	5/1/2013	75%	great win for us	$5,250.00
Data Mart - 3K	5/1/2013	75%	great win for us	$2,250.00
Data Mart - 9K	5/16/2013	75%	great win for us	$6,750.00
Data Mart - 11K	5/31/2013	75%	great win for us	$10,500.00
Data Mart - 7K	6/1/2013	75%	great win for us	$12,000.00
Data Mart - 50K	7/1/2013	75%	great win for us	$12,000.00
Grand Totals (17 records)				
		avg 82%		$159,150.00

Summary Report Fact Map

This example shows how the values in a summary report are represented in the fact map.

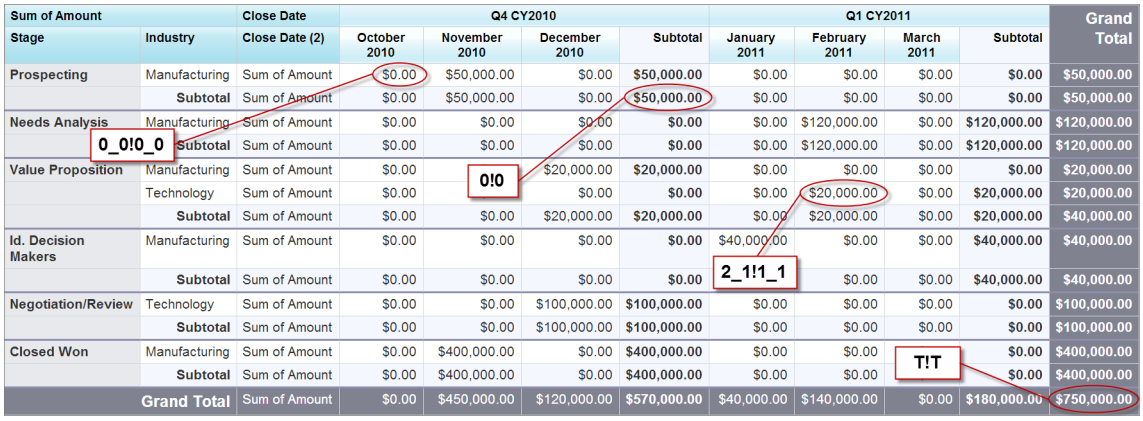


Opportunity Name	Account Name	Amount	Type	Probability (%)	Fiscal Period	Age
Stage: Prospecting **(1 record)**		$45,000.00				
Industry: Manufacturing **(1 record)**		$45,000.00				
Acme - Widgets	Acme	$45,000.00	New Business	10%	Q2-2013	177
Stage: Needs Analysis **(1 record)**		$105,000.00				
Industry: Manufacturing **(1 record)**		$105,000.00				
Global Gadgets	Global Media	$105,000.00	Existing Business	20%	Q2-2013	184

Fact Map Key	Description
`0!T`	Summary for the value of opportunities in the Prospecting stage.
`1_0!T`	Summary of the probabilities for the Manufacturing opportunities in the Needs Analysis stage.

Matrix Report Fact Map

Here's an example of some fact map keys for data in a matrix opportunities report with a couple of row and column groupings.



Sum of Amount		Close Date	Q4 CY2010				Q1 CY2011				Grand Total
Stage	Industry	Close Date (2)	October 2010	November 2010	December 2010	Subtotal	January 2011	February 2011	March 2011	Subtotal	
Prospecting	Manufacturing	Sum of Amount	$0.00	$50,000.00	$0.00	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00
	Subtotal	Sum of Amount	$0.00	$50,000.00	$0.00	$50,000.00	$0.00	$0.00	$0.00	$0.00	$50,000.00
Needs Analysis	Manufacturing	Sum of Amount	$0.00	$0.00	$0.00	$0.00	$0.00	$120,000.00	$0.00	$120,000.00	$120,000.00
	Subtotal	Sum of Amount	$0.00	$0.00	$0.00	$0.00	$0.00	$120,000.00	$0.00	$120,000.00	$120,000.00
Value Proposition	Manufacturing	Sum of Amount	$0.00		$20,000.00	$20,000.00	$0.00	$0.00	$0.00	$0.00	$20,000.00
	Technology	Sum of Amount	$0.00		$0.00	$0.00	$0.00	$20,000.00	$0.00	$20,000.00	$20,000.00
	Subtotal	Sum of Amount	$0.00	$0.00	$20,000.00	$20,000.00	$0.00	$20,000.00	$0.00	$20,000.00	$40,000.00
Id. Decision Makers	Manufacturing	Sum of Amount	$0.00	$0.00	$0.00	$0.00	$40,000.00	$0.00	$0.00	$40,000.00	$40,000.00
	Subtotal	Sum of Amount	$0.00	$0.00	$0.00	$0.00		$0.00	$0.00	$40,000.00	$40,000.00
Negotiation/Review	Technology	Sum of Amount	$0.00	$0.00	$100,000.00	$100,000.00	$0.00	$0.00	$0.00	$0.00	$100,000.00
	Subtotal	Sum of Amount	$0.00	$0.00	$100,000.00	$100,000.00	$0.00	$0.00	$0.00	$0.00	$100,000.00
Closed Won	Manufacturing	Sum of Amount	$0.00	$400,000.00	$0.00	$400,000.00	$0.00	$0.00		$0.00	$400,000.00
	Subtotal	Sum of Amount	$0.00	$400,000.00	$0.00	$400,000.00	$0.00	$0.00		$0.00	$400,000.00
	Grand Total	Sum of Amount	$0.00	$450,000.00	$120,000.00	$570,000.00	$40,000.00	$140,000.00	$0.00	$180,000.00	$750,000.00

Fact Map Key	Description
`0!0`	Total opportunity amount in the Prospecting stage in Q4 2010.
`0_0!0_0`	Total opportunity amount in the Prospecting stage in the Manufacturing sector in October 2010.
`2_1!1_1`	Total value of opportunities in the Value Proposition stage in the Technology sector in February 2011.
`T!T`	Grand total summary for the report.

SEE ALSO:

- Execute Sync
- Execute Async

Get Report Data without Saving Changes to or Creating a Report

Run a report without creating a report or changing an existing one by making a POST request to the `query` resource. Get report data without filling up your org with unnecessary reports.

Example

Get report data using the `query` resource.

```
/services/data/v37.0/analytics/reports/query
```

Include report criteria as `reportMetadata` in the POST request body. This POST request gets data about Opportunities:

```
{
"reportMetadata" : {
    "aggregates" : [ "RowCount" ],
    "chart" : null,
    "crossFilters" : [ ],
```

```
    "currency" : null,
    "description" : null,
    "detailColumns" : [ "OPPORTUNITY_NAME", "TYPE", "LEAD_SOURCE", "AMOUNT", "CLOSE_DATE",
 "NEXT_STEP", "STAGE_NAME", "PROBABILITY", "FISCAL_QUARTER", "AGE", "CREATED_DATE",
"FULL_NAME", "ROLLUP_DESCRIPTION", "ACCOUNT_NAME" ],
    "developerName" : "OpportunityReport",
    "division" : null,
    "folderId" : "00DD000000086ujMAA",
    "groupingsAcross" : [ ],
    "groupingsDown" : [ ],
    "hasDetailRows" : true,
    "hasRecordCount" : true,
    "historicalSnapshotDates" : [ ],
    "id" : "00OD0000001leVCMAY",
    "name" : "Matrix",
    "reportBooleanFilter" : null,
    "reportFilters" : [ ],
    "reportFormat" : "MATRIX",
    "reportType" : {
      "label" : "Opportunities",
      "type" : "Opportunity"
    },
    "scope" : "organization",
    "showGrandTotal" : true,
    "showSubtotals" : true,
    "sortBy" : [ ],
    "standardDateFilter" : {
      "column" : "CLOSE_DATE",
      "durationValue" : "CUSTOM",
      "endDate" : null,
      "startDate" : null
    },
    "standardFilters" : [ {
      "name" : "open",
      "value" : "all"
    }, {
      "name" : "probability",
      "value" : ">0"
    } ]
  }
}
```

The response to the POST request returns report data, but doesn't create or save a report.

```
{
  "attributes" : {
    "describeUrl" : "/services/data/v37.0/analytics/reports/null/describe",
    "instancesUrl" : "/services/data/v37.0/analytics/reports/null/instances",
    "reportId" : null,
    "reportName" : "Matrix",
    "type" : "Report"
  },
  "allData" : true,
  "factMap" : {
    "T!T" : {
```

```
"aggregates" : [ {
  "label" : "9",
  "value" : 9
} ],
"rows" : [ {
  "dataCells" : [ {
    "label" : "salesforce.com - 5000 Widgets",
    "value" : "006D000000CzmqYIAR"
  }, {
    "label" : "New Business",
    "value" : "New Business"
  }, {
    "label" : "Advertisement",
    "value" : "Advertisement"
  }, {
    "label" : "$500,000.00",
    "value" : {
      "amount" : 500000,
      "currency" : null
    }
  }, {
    "label" : "9/19/2013",
    "value" : "2013-09-19"
  }, {
    "label" : "Closed!",
    "value" : "Closed!"
  }, {
    "label" : "Closed Won",
    "value" : "Closed Won"
  }, {
    "label" : "100%",
    "value" : 100
  }, {
    "label" : "Q2-2007",
    "value" : "Q2-2007"
  }, {
    "label" : "0",
    "value" : 0
  }, {
    "label" : "1/4/2016",
    "value" : "2016-01-04"
  }, {
    "label" : "Fred Williamson",
    "value" : "005D0000001bV42IAE"
  }, {
    "label" : "-",
    "value" : null
  }, {
    "label" : "Global Media",
    "value" : "001D000000KtTTqIAN"
  } ]
}, {
  "dataCells" : [ {
    "label" : "salesforce.com - 500 Widgets",
```

```
        "value" : "006D000000CzmqZIAR"
      }, {
        "label" : "Existing Business",
        "value" : "Existing Business"
      }, {
        "label" : "Advertisement",
        "value" : "Advertisement"
      }, {
        "label" : "$50,000.00",
        "value" : {
          "amount" : 50000,
          "currency" : null
        }
      }, {
        "label" : "9/19/2013",
        "value" : "2013-09-19"
      }, {
        "label" : "Closed!",
        "value" : "Closed!"
      }, {
        "label" : "Closed Won",
        "value" : "Closed Won"
      }, {
        "label" : "100%",
        "value" : 100
      }, {
        "label" : "Q2-2007",
        "value" : "Q2-2007"
      }, {
        "label" : "0",
        "value" : 0
      }, {
        "label" : "1/4/2016",
        "value" : "2016-01-04"
      }, {
        "label" : "Fred Williamson",
        "value" : "005D0000001bV42IAE"
      }, {
        "label" : "-",
        "value" : null
      }, {
        "label" : "Global Media",
        "value" : "001D000000KtTTqIAN"
      } ]
    }, {
      "dataCells" : [ {
        "label" : "Acme - 1,200 Widgets",
        "value" : "006D000000CzmqbIAB"
      }, {
        "label" : "Existing Business",
        "value" : "Existing Business"
      }, {
        "label" : "Trade Show",
        "value" : "Trade Show"
```

```
    }, {
      "label" : "$140,000.00",
      "value" : {
        "amount" : 140000,
        "currency" : null
      }
    }, {
      "label" : "10/22/2013",
      "value" : "2013-10-22"
    }, {
      "label" : "Need estimate",
      "value" : "Need estimate"
    }, {
      "label" : "Value Proposition",
      "value" : "Value Proposition"
    }, {
      "label" : "50%",
      "value" : 50
    }, {
      "label" : "Q2-2007",
      "value" : "Q2-2007"
    }, {
      "label" : "134",
      "value" : 134
    }, {
      "label" : "1/4/2016",
      "value" : "2016-01-04"
    }, {
      "label" : "Fred Williamson",
      "value" : "005D0000001bV42IAE"
    }, {
      "label" : "-",
      "value" : null
    }, {
      "label" : "Acme",
      "value" : "001D000000KtTTrIAN"
    } ]
  }, {
    "dataCells" : [ {
      "label" : "salesforce.com - 1,000 Widgets",
      "value" : "006D000000CzmqeIAB"
    }, {
      "label" : "New Business",
      "value" : "New Business"
    }, {
      "label" : "Advertisement",
      "value" : "Advertisement"
    }, {
      "label" : "$100,000.00",
      "value" : {
        "amount" : 100000,
        "currency" : null
      }
    }, {
```

```
      "label" : "10/22/2013",
      "value" : "2013-10-22"
    }, {
      "label" : "Close the deal!",
      "value" : "Close the deal!"
    }, {
      "label" : "Negotiation/Review",
      "value" : "Negotiation/Review"
    }, {
      "label" : "90%",
      "value" : 90
    }, {
      "label" : "Q2-2007",
      "value" : "Q2-2007"
    }, {
      "label" : "134",
      "value" : 134
    }, {
      "label" : "1/4/2016",
      "value" : "2016-01-04"
    }, {
      "label" : "Fred Williamson",
      "value" : "005D0000001bV42IAE"
    }, {
      "label" : "-",
      "value" : null
    }, {
      "label" : "salesforce.com",
      "value" : "001D000000KtTTsIAN"
    } ]
  }, {
    "dataCells" : [ {
      "label" : "Global Media - 400 Widgets",
      "value" : "006D000000CzmqaIAB"
    }, {
      "label" : "New Business",
      "value" : "New Business"
    }, {
      "label" : "Partner",
      "value" : "Partner"
    }, {
      "label" : "$40,000.00",
      "value" : {
        "amount" : 40000,
        "currency" : null
      }
    }, {
      "label" : "11/20/2013",
      "value" : "2013-11-20"
    }, {
      "label" : "-",
      "value" : null
    }, {
      "label" : "Id. Decision Makers",
```

```
      "value" : "Id. Decision Makers"
    }, {
      "label" : "60%",
      "value" : 60
    }, {
      "label" : "Q3-2007",
      "value" : "Q3-2007"
    }, {
      "label" : "134",
      "value" : 134
    }, {
      "label" : "1/4/2016",
      "value" : "2016-01-04"
    }, {
      "label" : "Fred Williamson",
      "value" : "005D0000001bV42IAE"
    }, {
      "label" : "-",
      "value" : null
    }, {
      "label" : "Global Media",
      "value" : "001D000000KtTTqIAN"
    } ]
  }, {
    "dataCells" : [ {
      "label" : "Acme - 600 Widgets",
      "value" : "006D000000CzmqcIAB"
    }, {
      "label" : "New Business",
      "value" : "New Business"
    }, {
      "label" : "Trade Show",
      "value" : "Trade Show"
    }, {
      "label" : "$70,000.00",
      "value" : {
        "amount" : 70000,
        "currency" : null
      }
    }, {
      "label" : "12/18/2013",
      "value" : "2013-12-18"
    }, {
      "label" : "Need estimate",
      "value" : "Need estimate"
    }, {
      "label" : "Needs Analysis",
      "value" : "Needs Analysis"
    }, {
      "label" : "20%",
      "value" : 20
    }, {
      "label" : "Q3-2007",
      "value" : "Q3-2007"
```

```
      }, {
        "label" : "134",
        "value" : 134
      }, {
        "label" : "1/4/2016",
        "value" : "2016-01-04"
      }, {
        "label" : "Fred Williamson",
        "value" : "005D0000001bV42IAE"
      }, {
        "label" : "-",
        "value" : null
      }, {
        "label" : "Acme",
        "value" : "001D000000KtTTrIAN"
      } ]
    }, {
      "dataCells" : [ {
        "label" : "salesforce.com - 2,000 Widgets",
        "value" : "006D000000CzmqfIAB"
      }, {
        "label" : "Existing Business",
        "value" : "Existing Business"
      }, {
        "label" : "Partner",
        "value" : "Partner"
      }, {
        "label" : "$20,000.00",
        "value" : {
          "amount" : 20000,
          "currency" : null
        }
      }, {
        "label" : "12/20/2013",
        "value" : "2013-12-20"
      }, {
        "label" : "Meet at Widget Conference",
        "value" : "Meet at Widget Conference"
      }, {
        "label" : "Value Proposition",
        "value" : "Value Proposition"
      }, {
        "label" : "50%",
        "value" : 50
      }, {
        "label" : "Q3-2007",
        "value" : "Q3-2007"
      }, {
        "label" : "134",
        "value" : 134
      }, {
        "label" : "1/4/2016",
        "value" : "2016-01-04"
      }, {
```

```
      "label" : "Fred Williamson",
      "value" : "005D0000001bV42IAE"
    }, {
      "label" : "-",
      "value" : null
    }, {
      "label" : "salesforce.com",
      "value" : "001D000000KtTTsIAN"
    } ]
  }, {
    "dataCells" : [ {
      "label" : "Acme - 200 Widgets",
      "value" : "006D000000CzmqdIAB"
    }, {
      "label" : "Existing Business",
      "value" : "Existing Business"
    }, {
      "label" : "Word of mouth",
      "value" : "Word of mouth"
    }, {
      "label" : "$20,000.00",
      "value" : {
        "amount" : 20000,
        "currency" : null
      }
    }, {
      "label" : "2/20/2014",
      "value" : "2014-02-20"
    }, {
      "label" : "Need estimate",
      "value" : "Need estimate"
    }, {
      "label" : "Prospecting",
      "value" : "Prospecting"
    }, {
      "label" : "10%",
      "value" : 10
    }, {
      "label" : "Q4-2007",
      "value" : "Q4-2007"
    }, {
      "label" : "134",
      "value" : 134
    }, {
      "label" : "1/4/2016",
      "value" : "2016-01-04"
    }, {
      "label" : "Fred Williamson",
      "value" : "005D0000001bV42IAE"
    }, {
      "label" : "-",
      "value" : null
    }, {
      "label" : "Acme",
```

```
          "value" : "001D000000KtTTrIAN"
        } ]
      }, {
        "dataCells" : [ {
          "label" : "Fred",
          "value" : "006D000000Czq0uIAB"
        }, {
          "label" : "-",
          "value" : null
        }, {
          "label" : "-",
          "value" : null
        }, {
          "label" : "-",
          "value" : null
        }, {
          "label" : "2/26/2016",
          "value" : "2016-02-26"
        }, {
          "label" : "-",
          "value" : null
        }, {
          "label" : "Id. Decision Makers",
          "value" : "Id. Decision Makers"
        }, {
          "label" : "60%",
          "value" : 60
        }, {
          "label" : "Q1-2016",
          "value" : "Q1-2016"
        }, {
          "label" : "85",
          "value" : 85
        }, {
          "label" : "2/22/2016",
          "value" : "2016-02-22"
        }, {
          "label" : "Fred Williamson",
          "value" : "005D0000001bV42IAE"
        }, {
          "label" : "-",
          "value" : null
        }, {
          "label" : "Fred",
          "value" : "001D000000KtqzeIAB"
        } ]
      } ]
    }
  },
  "groupingsAcross" : {
    "groupings" : [ ]
  },
  "groupingsDown" : {
    "groupings" : [ ]
```

```
},
"hasDetailRows" : true,
"reportExtendedMetadata" : {
  "aggregateColumnInfo" : {
    "RowCount" : {
      "dataType" : "int",
      "label" : "Record Count"
    }
  },
  "detailColumnInfo" : {
    "OPPORTUNITY_NAME" : {
      "dataType" : "string",
      "label" : "Opportunity Name"
    },
    "TYPE" : {
      "dataType" : "picklist",
      "label" : "Type"
    },
    "LEAD_SOURCE" : {
      "dataType" : "picklist",
      "label" : "Lead Source"
    },
    "AMOUNT" : {
      "dataType" : "currency",
      "label" : "Amount"
    },
    "CLOSE_DATE" : {
      "dataType" : "date",
      "label" : "Close Date"
    },
    "NEXT_STEP" : {
      "dataType" : "string",
      "label" : "Next Step"
    },
    "STAGE_NAME" : {
      "dataType" : "picklist",
      "label" : "Stage"
    },
    "PROBABILITY" : {
      "dataType" : "percent",
      "label" : "Probability (%)"
    },
    "FISCAL_QUARTER" : {
      "dataType" : "string",
      "label" : "Fiscal Period"
    },
    "AGE" : {
      "dataType" : "int",
      "label" : "Age"
    },
    "CREATED_DATE" : {
      "dataType" : "datetime",
      "label" : "Created Date"
    },
```

```
      "FULL_NAME" : {
        "dataType" : "string",
        "label" : "Opportunity Owner"
      },
      "ROLLUP_DESCRIPTION" : {
        "dataType" : "string",
        "label" : "Owner Role"
      },
      "ACCOUNT_NAME" : {
        "dataType" : "string",
        "label" : "Account Name"
      }
    },
    "groupingColumnInfo" : { }
  },
  "reportMetadata" : {
    "aggregates" : [ "RowCount" ],
    "chart" : null,
    "crossFilters" : [ ],
    "currency" : null,
    "description" : null,
   "detailColumns" : [ "OPPORTUNITY_NAME", "TYPE", "LEAD_SOURCE", "AMOUNT", "CLOSE_DATE",
 "NEXT_STEP", "STAGE_NAME", "PROBABILITY", "FISCAL_QUARTER", "AGE", "CREATED_DATE",
"FULL_NAME", "ROLLUP_DESCRIPTION", "ACCOUNT_NAME" ],
    "developerName" : null,
    "division" : null,
    "folderId" : "00DD000000086ujMAA",
    "groupingsAcross" : [ ],
    "groupingsDown" : [ ],
    "hasDetailRows" : true,
    "hasRecordCount" : true,
    "historicalSnapshotDates" : [ ],
    "id" : null,
    "name" : "Matrix",
    "reportBooleanFilter" : null,
    "reportFilters" : [ ],
    "reportFormat" : "TABULAR",
    "reportType" : {
      "label" : "Opportunities",
      "type" : "Opportunity"
    },
    "scope" : "organization",
    "showGrandTotal" : true,
    "showSubtotals" : true,
    "sortBy" : [ ],
    "standardDateFilter" : {
      "column" : "CLOSE_DATE",
      "durationValue" : "CUSTOM",
      "endDate" : null,
      "startDate" : null
    },
    "standardFilters" : [ {
      "name" : "open",
      "value" : "all"
```

```
    }, {
      "name" : "probability",
      "value" : ">0"
    } ]
  }
}
```

Save Changes to Reports

Save changes to a report by sending a PATCH request to the Report resource.

Note: Saving a report deletes any running async report jobs because they will be obsolete.

Example

For report 00OD0000001cxIE, you want to change the report name to “myUpdatedReport” and change the folder that contains the report. You save the changes to the report.

This PATCH request `/services/data/v34.0/analytics/reports/00OD0000001cxIE` to the Report resource updates and saves the report.

```
{
   "reportMetadata" : {
      "name":"myUpdatedReport",
      "folderId":"00DD00000007enH"}
}
```

The response to the PATCH request returns the following details about the updated, saved report.

```
{
   "reportExtendedMetadata" : {
      ...
   },
   "reportMetadata" : {
      "aggregates" : [ "RowCount" ],
      "chart" : null,
      "currency" : null,
      "description" : null,
      "detailColumns" : [
         "USERS.NAME",
         "ACCOUNT.NAME",
         "TYPE",
         "DUE_DATE",
         "LAST_UPDATE",
         "ADDRESS1_STATE" ],
      "developerName" : "myreport",
      "division" : null,
      "folderId" : "00DD00000007enHMAQ",
      "groupingsAcross" : [ ],
      "groupingsDown" : [ ],
      "hasDetailRows" : true,
      "hasRecordCount" : true,
      "historicalSnapshotDates" : [ ],
      "id" : "00OD0000001cxIEMAY",
```

```
      "name" : "myUpdatedReport",
      "reportBooleanFilter" : null,
      "reportFilters" : [ ],
      "reportFormat" : "TABULAR",
      "reportType" : {
         "label" : "Accounts",
         "type" : "AccountList" },
      "scope" : "user",
      "showGrandTotal" : true,
      "showSubtotals" : true,
      "sortBy" : [ ],
      "standardDateFilter" : {
         "column" : "CREATED_DATE",
         "durationValue" : "CUSTOM",
         "endDate" : null,
         "startDate" : null },
      "standardFilters" : null },
   "reportTypeMetadata" : {
      ...
   }
}
```

Clone Reports

Creates a copy of a custom, standard, or public report by sending a POST request to the Report List resource.

Example

You want to clone report 00OD0000001cxlE and name the cloned report as "myNewReport."

This POST request `/services/data/v34.0/analytics/reports?cloneId=00OD0000001cxIE` to the Report List resource clones the report.

```
{ "reportMetadata" :
   {"name":"myNewReport"}
}
```

The response to the POST request returns the following details about the cloned report.

```
{
   "reportExtendedMetadata" : {
      ...
   },
   "reportMetadata" : {
      "aggregates" : [ "RowCount" ],
      "chart" : null,
      "currency" : null,
      "description" : null,
      "detailColumns" : [
         "USERS.NAME",
         "ACCOUNT.NAME",
         "TYPE",
         "DUE_DATE",
         "LAST_UPDATE",
```

```
         "ADDRESS1_STATE" ],
      "developerName" : "myreport2",
      "division" : null,
      "folderId" : "005D0000001UlszIAC",
      "groupingsAcross" : [ ],
      "groupingsDown" : [ ],
      "hasDetailRows" : true,
      "hasRecordCount" : true,
      "historicalSnapshotDates" : [ ],
      "id" : "00OD0000001jabSMAQ",
      "name" : "myNewReport",
      "reportBooleanFilter" : null,
      "reportFilters" : [ ],
      "reportFormat" : "TABULAR",
      "reportType" : {
         "label" : "Accounts",
         "type" : "AccountList" },
      "scope" : "user",
      "showGrandTotal" : true,
      "showSubtotals" : true,
      "sortBy" : [ ],
      "standardDateFilter" : {
         "column" : "CREATED_DATE",
         "durationValue" : "CUSTOM",
         "endDate" : null,
         "startDate" : null },
      "standardFilters" : null },
   "reportTypeMetadata" : {
      ...
   }
}
```

Delete Reports

Delete a report by sending a DELETE request to the Report resource. Deleted reports are moved to the Recycle Bin.

Note: Deleting a report also cancels any running async report jobs and deletes all scheduled notifications.

Example

This DELETE request `/services/data/v34.0/analytics/reports/00OD0000001cxIE` to the Report resource deletes the report and returns a 204 HTTP response code with no content in the response body.

Dashboards Examples

Learn how to refresh, create, edit, copy, and delete dashboards.

Get List of Recently Used Dashboards

You can get a list of recently used dashboards by using the Dashboard resource.

Get Dashboard Results

You can get dashboard metadata, data, and status by sending a GET request to the Dashboard Results resource.

Filter Dashboard Results

You can filter dashboard results, status, or refresh requests, by using filter parameters.

Get Dashboard Status

You can get the dashboard status by sending a GET request to the Dashboard Status resource.

Refresh a Dashboard

You can refresh a dashboard by using a PUT Dashboard Results request. Dynamic dashboards can also be refreshed via the REST API.

Save a Dashboard

You can save changes to a dashboard by sending a PATCH request to the Dashboard Results resource.

Save a Dashboard with a Custom Lightning Web Component (Beta)

You can save a dashboard with a custom Lightning web component by sending a PATCH request to the Dashboard Results resource.

Set a Sticky Dashboard Filter

Set a default filter value which gets applied to a dashboard when you open it. The default filter value you specify only applies to you (other people won't see it when they open the dashboard). If you change the filter value while viewing the dashboard, then the filter value you set in the user interface overwrites the value you set via the API. To set sticky filters for a dashboard, `canUseStickyFilter` must equal `true`.

Return Details About Dashboard Components

Get details about one or more dashboard components using a POST request.

Get Dashboard Metadata

Get details about dashboard metadata using a GET request.

Clone a Dashboard

Creates a copy of a dashboard by sending a POST request to the Dashboard List resource.

Delete a Dashboard

Get List of Recently Used Dashboards

You can get a list of recently used dashboards by using the Dashboard resource.

Use a GET request on the Dashboard List resource to retrieve a list of recently used dashboards. The list is sorted by the date when the dashboard was last refreshed.

Example Usage

```
/services/data/v35.0/analytics/dashboards
```

Example Response Body

In this case, the Dashboard resource returns information for two dashboards. Each URL handle stores the status or results for the dashboard.

```
[ {
  "id" : "01ZD00000007QeuMAE",
  "name" : "Adoption Dashboard",
  "statusUrl" : "/services/data/v35.0/analytics/dashboards/01ZD00000007QeuMAE/status",
  "url" : "/services/data/v35.0/analytics/dashboards/01ZD00000007QeuMAE"
}, {
  "id" : "01ZD00000007QevMAE",
```

```
  "name" : "Global Sales Dashboard",
  "statusUrl" : "/services/data/v35.0/analytics/dashboards/01ZD00000007QevMAE/status",
  "url" : "/services/data/v35.0/analytics/dashboards/01ZD00000007QevMAE"
} ]
```

SEE ALSO:

Dashboard List

Get Dashboard Results

You can get dashboard metadata, data, and status by sending a GET request to the Dashboard Results resource.

Use a GET request to the Dashboard Results resource to retrieve metadata, data, and status for a dashboard and its components. The results response contains:

- Metadata: information about the dashboard as a whole, including the dashboard ID, name, component metadata, and any dashboard filters.
- Data: underlying report data for each component, filtered by the optional filter parameters. For more information about filtering, see Filter Dashboard Results.
- Status: data and refresh status for each component of the dashboard. The data status can be `NODATA`, `DATA`, or `ERROR`. If an error occurs, the component status will contain additional properties with the error code, message, and severity. The refresh status can be `IDLE`, if components are finished running, or `RUNNING`, if components are still being refreshed.

Example Usage

```
/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE
```

Example Response Body

```
{
  "componentData" : [ {
    "componentId" : "01aD0000000a36LIAQ",
    "reportResult" : {
      "attributes" : null,
      "allData" : true,
      "factMap" : {
        "T!T" : {
          "aggregates" : [ {
            "label" : "USD 67,043,365.50",
            "value" : 67043365.50166918337345123291015625
          } ]
        },
        "0!T" : {
          "aggregates" : [ {
            "label" : "USD 10,083.33",
            "value" : 10083.33333333333393966313451528549194335937 5
          } ]
        },
        "1!T" : {
          "aggregates" : [ {
            "label" : "USD 25,016,768.67",
            "value" : 25016768.67006600648164749145507812 5
          } ]
```

```
    },
    "2!T" : {
      "aggregates" : [ {
        "label" : "USD 42,016,513.50",
        "value" : 42016513.498269841074943542480468 75
      } ]
    }
  },
  "groupingsAcross" : null,
  "groupingsDown" : {
    "groupings" : [ {
      "groupings" : [ ],
      "key" : "0",
      "label" : "-",
      "value" : null
    }, {
      "groupings" : [ ],
      "key" : "1",
      "label" : "Existing Business",
      "value" : "Existing Business"
    }, {
      "groupings" : [ ],
      "key" : "2",
      "label" : "New Business",
      "value" : "New Business"
    } ]
  },
  "hasDetailRows" : false,
  "reportExtendedMetadata" : {
    "aggregateColumnInfo" : {
      "s!AMOUNT" : {
        "acrossGroupingContext" : null,
        "dataType" : "currency",
        "downGroupingContext" : null,
        "label" : "Sum of Amount"
      }
    },
    "detailColumnInfo" : { },
    "groupingColumnInfo" : {
      "TYPE" : {
        "dataType" : "picklist",
        "groupingLevel" : 0,
        "label" : "Type"
      }
    }
  },
  "reportMetadata" : {
    "aggregates" : [ "s!AMOUNT" ],
    "chart" : null,
    "currency" : "USD",
    "description" : null,
    "detailColumns" : [ ],
    "developerName" : "Simple_Test",
    "division" : null,
```

```
        "folderId" : "00lR0000000M8IiIAK",
        "groupingsAcross" : [ ],
        "groupingsDown" : [ {
          "dateGranularity" : "None",
          "name" : "TYPE",
          "sortAggregate" : null,
          "sortOrder" : "Asc"
        } ],
        "hasDetailRows" : false,
        "hasRecordCount" : true,
        "historicalSnapshotDates" : [ ],
        "id" : "00OD0000001g2nWMAQ",
        "name" : "Simple Test",
        "reportBooleanFilter" : null,
        "reportFilters" : [ ],
        "reportFormat" : "SUMMARY",
        "reportType" : {
          "label" : "Opportunities",
          "type" : "Opportunity"
        },
        "scope" : "organization",
        "showGrandTotal" : true,
        "showSubtotals" : true,
        "sortBy" : [ ],
        "standardDateFilter" : { "column" : "CLOSE_DATE", "durationValue" : "CUSTOM",
"endDate" : null, "startDate" : null },
        "standardFilters" : [
          { "name" : "open", "value" : "all" },
          { "name" : "probability", "value" : ">0" } ]
      }
    },
    "status" : {
      "dataStatus" : "DATA",
      "errorCode" : null,
      "errorMessage" : null,
      "errorSeverity" : null,
      "refreshDate" : "2014-04-09T00:28:16.000+0000",
      "refreshStatus" : "IDLE"
    }
  } ],
  "dashboardMetadata" : {
    "attributes" : {
      "dashboardId" : "01ZD00000007S89MAE",
      "dashboardName" : "Simple Dashboard",
     "statusUrl" : "/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE/status",

      "type" : "Dashboard"
    },
    "canChangeRunningUser" : false,
    "components" : [ {
      "componentData" : 0,
      "footer" : null,
      "header" : null,
      "id" : "01aD0000000a36LIAQ",
```

```
      "properties" : {
        "aggregates" : [ { "name" : "s!AMOUNT" } ],
        "autoSelectColumns" : false,
        "groupings" : null,
        "maxRows" : null,
        "sort" : { "column" : "TYPE", "sortOrder" : "asc" },
        "useReportChart" : false,
        "visualizationProperties" : {
          "breakPoints" : [ {
            "aggregateName" : "s!AMOUNT",
            "breaks" : [
              { "color" : "000000", "lowerBound" : null, "upperBound" : -1 },
              { "color" : "000000", "lowerBound" : -1, "upperBound" : 0 },
              { "color" : "000000", "lowerBound" : 0, "upperBound" : null } ]

            } ],
            "metricLabel" : null },
          "visualizationType" : "Metric" },
        "reportId" : "00OD0000001g2nWMAQ",
        "title" : null,
        "type" : "Report"
      } ],
      "description" : null,
      "developerName" : "Simple_Dashboard",
      "filters" : [ {
        "name" : "Amount",
        "options" : [ {
          "alias" : null,
          "endValue" : null,
          "id" : "0ICD00000004CBiOAM",
          "operation" : "greaterThan",
          "startValue" : null,
          "value" : "USD 2000000"
        } ],
        "selectedOption" : null
      } ],
      "folderId" : "00lR0000000DrojIAC",
      "id" : "01ZD00000007S89MAE",
      "layout" : {
        "columns" : [ {
          "components" : [ 0 ]
        } ]
      },
      "name" : "Simple Dashboard",
      "runningUser" : {
        "displayName" : "Allison Wheeler",
        "id" : "005D00000016V2qIAE"
      }
    }
}
```


SEE ALSO:

Dashboard Results

Filter Dashboard Results

You can filter dashboard results, status, or refresh requests, by using filter parameters.

Dashboard results are always unfiltered, unless you have specified filter parameters in your request. When requesting a dashboard result, status, or refresh, you can specify up to three optional filter parameters: `filter1`, `filter2` and `filter3`. These parameters allow you to apply filter options, which can be selected from the filters that are currently defined for the dashboard. Filters can be applied to the following requests:

- A GET request on the Dashboard Results resource: returns data filtered by the specified parameters.
- A PUT request on the Dashboard Results resource: refreshes the data that has been filtered by the specified parameters.
- A GET request on the Dashboard Status resource: returns status for the data that has been filtered by the specified parameters.

Example Usage

A dashboard with one filter ("Country") and two options ("United States" and "Canada") appears like this in the dashboard metadata:

```
{
  "dashboardMetadata" : {
    ...

    "filters" : [ {
        "name" : "Country",
        "options" : [ {
            "id" : "0ICxx0000000001GAA",
            "alias" : "United States",
            "operation" : "equals",
            "value" : "US",
            "startValue" : null,
            "endValue" : null
         } ], [ {
            "id" : "0ICxx0000000002GAA",
            "alias" : "Canada",
            "operation" : "equals",
            "value" : "CA",
            "startValue" : null,
            "endValue" : null
         } ],

    ...
}
```

To retrieve dashboard results with a filter of "Country equals Canada" you could make the following GET request:

```
/services/data/v31.0/analytics/dashboards/01Zxx0000000000000?filter1=0ICxx0000000002GAA
```

SEE ALSO:

Dashboard Results

Dashboard Status

Get Dashboard Status

You can get the dashboard status by sending a GET request to the Dashboard Status resource.

Use the Dashboard Status resource to retrieve a status for each component of the dashboard. The components are listed in the order in which they were refreshed. The request returns `IDLE` if a component is not currently being refreshed, and `RUNNING` if a component is currently being refreshed.

Example Usage

To retrieve the status for a dashboard with an ID of `01ZD00000007QevMAE`, you could make the following request:

```
/services/data/v31.0/analytics/dashboards/01ZD00000007QevMAE/status
```

Example Response Body

The response contains the status for each component, along with the refresh date and time:

```
{
  "componentStatus" : [ {
    "componentId" : "01aD0000000J7M7",
    "refreshDate" : "2014-03-10T17:26:07.000+0000",
    "refreshStatus" : "IDLE"
  }, {
    "componentId" : "01aD0000000J7M9",
    "refreshDate" : "2014-03-10T17:26:08.000+0000",
    "refreshStatus" : "IDLE"
  }, {
    "componentId" : "01aD0000000J7MB",
    "refreshDate" : "2014-03-10T17:26:09.000+0000",
    "refreshStatus" : "IDLE"
  } ]
}
```

SEE ALSO:

Dashboard Status

Refresh a Dashboard

You can refresh a dashboard by using a PUT Dashboard Results request. Dynamic dashboards can also be refreshed via the REST API.

Use a PUT request on the Dashboard Results resource to trigger a refresh of a dashboard. The refresh response returns the URL of the status resource after the refresh is triggered. If filter parameters are included in the PUT request, only the filtered data will be refreshed. For more information on filtering, see Filter Dashboard Results.

Example Usage

The following PUT request refreshes the dashboard with the ID of `01ZD00000007S89MAE`.

```
/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE
```

Example Request Body

None required.

Example Response Body

The response contains the status URL for the refreshed dashboard:

```
{
  "statusUrl" : "/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE/status"
}
```

SEE ALSO:

Dashboard Results

Save a Dashboard

You can save changes to a dashboard by sending a PATCH request to the Dashboard Results resource.

Use a PATCH request on the Dashboard Results resource to save changes to a dashboard.

Example Usage

```
/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE
```

Example Request Body

```
{
  "dashboardMetadata" : {
    "name" : "Sales Dashboard",
  }
}
```

Example Response Body

```
{
  "componentData" : [ {
    "componentId" : "01aD0000000a36LIAQ",
    "reportResult" : {
      "attributes" : null,
      "allData" : true,
      "factMap" : {
        "T!T" : {
          "aggregates" : [ {
            "label" : "USD 67,043,365.50",
            "value" : 67043365.5016691833734512329101562 5
          } ]
        },
        "0!T" : {
          "aggregates" : [ {
            "label" : "USD 10,083.33",
            "value" : 10083.33333333333393966313451528549194335937 5
          } ]
        },
        "1!T" : {
          "aggregates" : [ {
            "label" : "USD 25,016,768.67",
            "value" : 25016768.67006600648164749145507812 5
          } ]
```

```
    },
    "2!T" : {
      "aggregates" : [ {
        "label" : "USD 42,016,513.50",
        "value" : 42016513.498269841074943542480468 75
      } ]
    }
  },
  "groupingsAcross" : null,
  "groupingsDown" : {
    "groupings" : [ {
      "groupings" : [ ],
      "key" : "0",
      "label" : "-",
      "value" : null
    }, {
      "groupings" : [ ],
      "key" : "1",
      "label" : "Existing Business",
      "value" : "Existing Business"
    }, {
      "groupings" : [ ],
      "key" : "2",
      "label" : "New Business",
      "value" : "New Business"
    } ]
  },
  "hasDetailRows" : false,
  "reportExtendedMetadata" : {
    "aggregateColumnInfo" : {
      "s!AMOUNT" : {
        "acrossGroupingContext" : null,
        "dataType" : "currency",
        "downGroupingContext" : null,
        "label" : "Sum of Amount"
      }
    },
    "detailColumnInfo" : { },
    "groupingColumnInfo" : {
      "TYPE" : {
        "dataType" : "picklist",
        "groupingLevel" : 0,
        "label" : "Type"
      }
    }
  },
  "reportMetadata" : {
    "aggregates" : [ "s!AMOUNT" ],
    "chart" : null,
    "currency" : "USD",
    "description" : null,
    "detailColumns" : [ ],
    "developerName" : "Simple_Test",
    "division" : null,
```

```
        "folderId" : "00lR0000000M8IiIAK",
        "groupingsAcross" : [ ],
        "groupingsDown" : [ {
          "dateGranularity" : "None",
          "name" : "TYPE",
          "sortAggregate" : null,
          "sortOrder" : "Asc"
        } ],
        "hasDetailRows" : false,
        "hasRecordCount" : true,
        "historicalSnapshotDates" : [ ],
        "id" : "00OD0000001g2nWMAQ",
        "name" : "Simple Test",
        "reportBooleanFilter" : null,
        "reportFilters" : [ ],
        "reportFormat" : "SUMMARY",
        "reportType" : {
          "label" : "Opportunities",
          "type" : "Opportunity"
        },
        "scope" : "organization",
        "showGrandTotal" : true,
        "showSubtotals" : true,
        "sortBy" : [ ],
        "standardDateFilter" : { "column" : "CLOSE_DATE", "durationValue" : "CUSTOM",
"endDate" : null, "startDate" : null },
        "standardFilters" : [
          { "name" : "open", "value" : "all" },
          { "name" : "probability", "value" : ">0" } ]
      }
    },
    "status" : {
      "dataStatus" : "DATA",
      "errorCode" : null,
      "errorMessage" : null,
      "errorSeverity" : null,
      "refreshDate" : "2014-04-09T00:28:16.000+0000",
      "refreshStatus" : "IDLE"
    }
  } ],
  "dashboardMetadata" : {
    "attributes" : {
      "dashboardId" : "01ZD00000007S89MAE",
      "dashboardName" : "Service Dept Dashboard",
     "statusUrl" : "/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE/status",

      "type" : "Dashboard"
    },
    "canChangeRunningUser" : false,
    "components" : [ {
      "componentData" : 0,
      "footer" : null,
      "header" : null,
      "id" : "01aD0000000a36LIAQ",
```

```
      "properties" : {
        "aggregates" : [ { "name" : "s!AMOUNT" } ],
        "autoSelectColumns" : false,
        "groupings" : null,
        "maxRows" : null,
        "sort" : { "column" : "TYPE", "sortOrder" : "asc" },
        "useReportChart" : false,
        "visualizationProperties" : {
          "breakPoints" : [ {
            "aggregateName" : "s!AMOUNT",
            "breaks" : [
              { "color" : "000000", "lowerBound" : null, "upperBound" : -1 },
              { "color" : "000000", "lowerBound" : -1, "upperBound" : 0 },
              { "color" : "000000", "lowerBound" : 0, "upperBound" : null } ]

            } ],
            "metricLabel" : null },
          "visualizationType" : "Metric" },
      "reportId" : "00OD0000001g2nWMAQ",
      "title" : null,
      "type" : "Report"
    } ],
    "description" : null,
    "developerName" : "Simple_Dashboard",
    "filters" : [ {
      "name" : "Amount",
      "options" : [ {
        "alias" : null,
        "endValue" : null,
        "id" : "0ICD00000004CBiOAM",
        "operation" : "greaterThan",
        "startValue" : null,
        "value" : "USD 2000000"
      } ],
      "selectedOption" : null
    } ],
    "folderId" : "00lR0000000DrojIAC",
    "id" : "01ZD00000007S89MAE",
    "layout" : {
      "columns" : [ {
        "components" : [ 0 ]
      } ]
    },
    "name" : "Simple Dashboard",
    "runningUser" : {
      "displayName" : "Allison Wheeler",
      "id" : "005D00000016V2qIAE"
    }
  }
}
```

Save a Dashboard with a Custom Lightning Web Component (Beta)

You can save a dashboard with a custom Lightning web component by sending a PATCH request to the Dashboard Results resource.

Note: This feature is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Example Usage

```
/services/data/v31.0/analytics/dashboards/01ZD00000007S89MAE
```

Example Request Body

```
{
    "components": [{
        "header": "",
        "properties": {
            "content": {
                "componentParameters":
"{\"componentApiName\":\"c:kpiDashboard\",\"properties\":\"{\\\"maxCards\\\":1,\\\"showProgressBars\\\":true,\\\"showSummary\\\":false}\"}"

            },
            "visualizationType": "LightningWebComponent"
        },
        "type": "Dashboard",
        "componentData": 0
    }]
}
```

Example Response Body

```
components" : [{
    "chartTheme" : null,
    "componentData" : null,
    "footer" : null,
    "header" : null,
    "id" : "01aSG0000088inFYAQ",
    "lastModifiedDate" : "2025-12-18T05:03:56Z",
    "properties" : {
        "content" : {
            "componentParameters" :
"{\"componentApiName\":\"c:kpiDashboard\",\"properties\":\"{\\\"maxCards\\\":1,\\\"showProgressBars\\\":true,\\\"showSummary\\\":false}\"}"

        },
        "visualizationType" : "LightningWebComponent"
    },
    "reportId" : null,
    "title" : null,
    "type" : "Dashboard"
}]
```

Set a Sticky Dashboard Filter

Set a default filter value which gets applied to a dashboard when you open it. The default filter value you specify only applies to you (other people won't see it when they open the dashboard). If you change the filter value while viewing the dashboard, then the filter value you set in the user interface overwrites the value you set via the API. To set sticky filters for a dashboard, `canUseStickyFilter` must equal `true`.

Use a PATCH request on the Dashboard Results resource and append the parameter `isStickyFilterSave=true` to set a sticky filter.

In the request body, set the `selectedOption` property to the index of the filter option you'd like to apply.

Example Usage

```
/services/data/v40.0/analytics/dashboards/0IBR00000004D4iOAE?isStickyFilterSave=true
```

Example Request Body

```
{
  "filters" : [ {
    "errorMessage" : null,
    "id" : "0IBR00000004D4iOAE",
    "name" : "Billing City",
    "options" : [ {
      "alias" : "New York City",
      "endValue" : null,
      "id" : "0ICR00000004FtQOAU",
      "operation" : "equals",
      "startValue" : null,
      "value" : "New York City"
      }, {
      "alias" : "Chicago",
      "endValue" : null,
      "id" : "0ICR00000004FtROAU",
      "operation" : "equals",
      "startValue" : null,
      "value" : "Chicago"
      }, {
      "alias" : "Los Angeles",
      "endValue" : null,
      "id" : "0ICR00000004FtSOAU",
      "operation" : "equals",
      "startValue" : null,
      "value" : "Los Angeles"
      }
    ],
    "selectedOption" : 1
    }
  ]
}
```

Example Response Body

If successful, an empty response body is returned.

Return Details About Dashboard Components

Get details about one or more dashboard components using a POST request.

Use a POST request on the Dashboard Results resource to get details about one or more dashboard components. Specify which dashboard components you want details about using `componentIds` in the request body. Available in API versions 36.0 and later.

Example Usage

```
/services/data/v36.0/analytics/dashboards/01ZR00000008h2EMAQ
```

Example Request Body

```
{
 "componentIds": ["01aR00000005aT4IAI", "01aR00000005aT5IAI"]
}
```

Example Response Body

```
{
  "attributes" : {
    "dashboardId" : "01ZR00000008h2EMAQ",
    "dashboardName" : "Liz's Sales Manager Dashboard",
    "describeUrl" :
"/services/data/v37.0/analytics/dashboards/01ZR00000008h2EMAQ/describe",
   "statusUrl" : "/services/data/v37.0/analytics/dashboards/01ZR00000008h2EMAQ/status",

    "type" : "Dashboard"
  },
  "componentData" : [ {
    "componentId" : "01aR00000005aT4IAI",
    "reportResult" : {
      "attributes" : null,
      "allData" : true,
      "factMap" : {
        "0!T" : {
          "aggregates" : [ {
            "label" : "$10,000.00",
            "value" : 10000
          } ]
        },
        "1!T" : {
          "aggregates" : [ {
            "label" : "$110,000.00",
            "value" : 110000
          } ]
        },
        "0_0!T" : {
          "aggregates" : [ {
            "label" : "$10,000.00",
            "value" : 10000
          } ]
        },
        "2_2!T" : {
          "aggregates" : [ {
            "label" : "$143.00",
            "value" : 143
```

```
      } ]
    },
    "2!T" : {
      "aggregates" : [ {
        "label" : "$400,398.00",
        "value" : 400398
      } ]
    },
    "0_1!T" : {
      "aggregates" : [ {
        "label" : "$0.00",
        "value" : 0
      } ]
    },
    "2_3!T" : {
      "aggregates" : [ {
        "label" : "$100,017.00",
        "value" : 100017
      } ]
    },
    "T!T" : {
      "aggregates" : [ {
        "label" : "$520,398.00",
        "value" : 520398
      } ]
    },
    "2_0!T" : {
      "aggregates" : [ {
        "label" : "$138.00",
        "value" : 138
      } ]
    },
    "1_0!T" : {
      "aggregates" : [ {
        "label" : "$110,000.00",
        "value" : 110000
      } ]
    },
    "2_1!T" : {
      "aggregates" : [ {
        "label" : "$300,100.00",
        "value" : 300100
      } ]
    }
  },
  "groupingsAcross" : null,
  "groupingsDown" : {
    "groupings" : [ {
      "groupings" : [ {
        "groupings" : [ ],
        "key" : "0_0",
        "label" : "-",
        "value" : null
      }, {
```

```
        "groupings" : [ ],
        "key" : "0_1",
        "label" : "-",
        "value" : null
      } ],
      "key" : "0",
      "label" : "January 2016",
      "value" : "January 2016"
    }, {
      "groupings" : [ {
        "groupings" : [ ],
        "key" : "1_0",
        "label" : "-",
        "value" : null
      } ],
      "key" : "1",
      "label" : "February 2016",
      "value" : "February 2016"
    }, {
      "groupings" : [ {
        "groupings" : [ ],
        "key" : "2_0",
        "label" : "-",
        "value" : null
      }, {
        "groupings" : [ ],
        "key" : "2_1",
        "label" : "-",
        "value" : null
      }, {
        "groupings" : [ ],
        "key" : "2_2",
        "label" : "-",
        "value" : null
      }, {
        "groupings" : [ ],
        "key" : "2_3",
        "label" : "-",
        "value" : null
      } ],
      "key" : "2",
      "label" : "March 2016",
      "value" : "March 2016"
    } ]
  },
  "hasDetailRows" : false,
  "reportExtendedMetadata" : {
    "aggregateColumnInfo" : {
      "s!AMOUNT" : {
        "dataType" : "currency",
        "label" : "Sum of Amount"
      }
    },
    "detailColumnInfo" : { },
```

```
        "groupingColumnInfo" : {
          "ACCOUNT_NAME" : {
            "dataType" : "string",
            "groupingLevel" : 0,
            "label" : "Account Name"
          },
          "CLOSE_DATE" : {
            "dataType" : "date",
            "groupingLevel" : 0,
            "label" : "Close Date"
          }
        }
      },
      "reportMetadata" : {
        "aggregates" : [ "s!AMOUNT" ],
        "buckets" : [ {
          "bucketType" : "picklist",
          "devloperName" : "BucketField_47575792",
          "label" : "Industry",
          "nullTreatedAsZero" : false,
          "otherBucketLabel" : null,
          "sourceColumnName" : "INDUSTRY",
          "values" : [ {
            "label" : "Technology",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Agriculture", "Apparel", "Banking",
"Biotechnology", "Chemicals", "Communications", "Construction", "Consulting", "Education",
 "Electronics" ]
          }, {
            "label" : "Energy",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Energy", "Engineering", "Entertainment",
"Environmental", "Finance", "Food & Beverage", "Government", "Healthcare", "Hospitality",
 "Insurance", "Machinery", "Manufacturing" ]
          }, {
            "label" : "Healthcare",
            "rangeUpperBound" : null,
           "sourceDimensionValues" : [ "Media", "Not For Profit", "Other", "Recreation",
 "Retail", "Shipping", "Technology", "Telecommunications", "Transportation", "Utilities"
 ]
          } ]
        }, {
          "bucketType" : "picklist",
          "devloperName" : "BucketField_36625466",
          "label" : "Stage",
          "nullTreatedAsZero" : false,
          "otherBucketLabel" : null,
          "sourceColumnName" : "STAGE_NAME",
          "values" : [ {
            "label" : "Early",
            "rangeUpperBound" : null,
           "sourceDimensionValues" : [ "Prospecting", "Qualification", "Needs Analysis"
 ]
          }, {
```

```
            "label" : "Late",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Value Proposition", "Id. Decision Makers",
"Perception Analysis", "Proposal/Price Quote", "Negotiation/Review" ]
          }, {
            "label" : "Won",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Closed Won" ]
          }, {
            "label" : "Lost",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Closed Lost" ]
          } ]
        } ],
        "chart" : null,
        "crossFilters" : [ ],
        "currency" : null,
        "description" : null,
        "detailColumns" : [ ],
        "developerName" : "Deals_Closing_This_Quarter",
        "division" : null,
        "folderId" : "00lR0000000M8IiIAK",
        "groupingsAcross" : [ ],
        "groupingsDown" : [ {
          "dateGranularity" : "None",
          "name" : "ACCOUNT_NAME",
          "sortAggregate" : null,
          "sortOrder" : "Asc"
        }, {
          "dateGranularity" : "Month",
          "name" : "CLOSE_DATE",
          "sortAggregate" : null,
          "sortOrder" : "Asc"
        } ],
        "hasDetailRows" : false,
        "hasRecordCount" : true,
        "historicalSnapshotDates" : [ ],
        "id" : "00OR0000000K2UeMAK",
        "name" : "Deals Closing This Quarter",
        "reportBooleanFilter" : null,
        "reportFilters" : [ {
          "column" : "BucketField_36625466",
          "isRunPageEditable" : true,
          "operator" : "equals",
          "value" : "Early,Late"
        }, {
          "column" : "TYPE",
          "isRunPageEditable" : true,
          "operator" : "equals",
          "value" : "Existing Business,New Business"
        } ],
        "reportFormat" : "SUMMARY",
        "reportType" : {
          "label" : "Opportunities",
```

```
        "type" : "Opportunity"
      },
      "scope" : "organization",
      "showGrandTotal" : true,
      "showSubtotals" : true,
      "sortBy" : [ ],
      "standardDateFilter" : {
        "column" : "CLOSE_DATE",
        "durationValue" : "THIS_FISCAL_QUARTER",
        "endDate" : "2016-06-30",
        "startDate" : "2016-04-01"
      },
      "standardFilters" : [ {
        "name" : "open",
        "value" : "all"
      }, {
        "name" : "probability",
        "value" : ">0"
      } ]
    }
  },
  "status" : {
    "dataStatus" : "DATA",
    "errorCode" : null,
    "errorMessage" : null,
    "errorSeverity" : null,
    "refreshDate" : "2016-03-22T18:24:39.000+0000",
    "refreshStatus" : "IDLE"
  }
}, {
  "componentId" : "01aR00000005aT5IAI",
  "reportResult" : {
    "attributes" : null,
    "allData" : true,
    "factMap" : {
      "0!T" : {
        "aggregates" : [ {
          "label" : "$634,493.00",
          "value" : 634493
        } ]
      },
      "1!T" : {
        "aggregates" : [ {
          "label" : "$590,036.00",
          "value" : 590036
        } ]
      },
      "0_0!T" : {
        "aggregates" : [ {
          "label" : "$14.00",
          "value" : 14
        } ]
      },
      "2!T" : {
```

```
    "aggregates" : [ {
      "label" : "$1,330,035.00",
      "value" : 1330035
    } ]
  },
  "0_1!T" : {
    "aggregates" : [ {
      "label" : "$36,021.00",
      "value" : 36021
    } ]
  },
  "0_2!T" : {
    "aggregates" : [ {
      "label" : "$5,000.00",
      "value" : 5000
    } ]
  },
  "1_3!T" : {
    "aggregates" : [ {
      "label" : "$500,000.00",
      "value" : 500000
    } ]
  },
  "T!T" : {
    "aggregates" : [ {
      "label" : "$2,554,564.00",
      "value" : 2554564
    } ]
  },
  "0_3!T" : {
    "aggregates" : [ {
      "label" : "$440,000.00",
      "value" : 440000
    } ]
  },
  "1_4!T" : {
    "aggregates" : [ {
      "label" : "$13.00",
      "value" : 13
    } ]
  },
  "0_4!T" : {
    "aggregates" : [ {
      "label" : "$20,000.00",
      "value" : 20000
    } ]
  },
  "1_1!T" : {
    "aggregates" : [ {
      "label" : "$11.00",
      "value" : 11
    } ]
  },
  "0_5!T" : {
```

```
    "aggregates" : [ {
      "label" : "$90,000.00",
      "value" : 90000
    } ]
  },
  "1_2!T" : {
    "aggregates" : [ {
      "label" : "$40,000.00",
      "value" : 40000
    } ]
  },
  "0_6!T" : {
    "aggregates" : [ {
      "label" : "$43,320.00",
      "value" : 43320
    } ]
  },
  "0_7!T" : {
    "aggregates" : [ {
      "label" : "$138.00",
      "value" : 138
    } ]
  },
  "1_0!T" : {
    "aggregates" : [ {
      "label" : "$50,012.00",
      "value" : 50012
    } ]
  },
  "2_2!T" : {
    "aggregates" : [ {
      "label" : "$100,017.00",
      "value" : 100017
    } ]
  },
  "2_3!T" : {
    "aggregates" : [ {
      "label" : "$20,018.00",
      "value" : 20018
    } ]
  },
  "2_4!T" : {
    "aggregates" : [ {
      "label" : "$0.00",
      "value" : 0
    } ]
  },
  "2_0!T" : {
    "aggregates" : [ {
      "label" : "$100,000.00",
      "value" : 100000
    } ]
  },
  "2_1!T" : {
```

```
      "aggregates" : [ {
        "label" : "$1,110,000.00",
        "value" : 1110000
      } ]
    }
  },
  "groupingsAcross" : null,
  "groupingsDown" : {
    "groupings" : [ {
      "groupings" : [ {
        "groupings" : [ ],
        "key" : "0_0",
        "label" : "March 2013",
        "value" : "2013-03-01"
      }, {
        "groupings" : [ ],
        "key" : "0_1",
        "label" : "July 2015",
        "value" : "2015-07-01"
      }, {
        "groupings" : [ ],
        "key" : "0_2",
        "label" : "August 2015",
        "value" : "2015-08-01"
      }, {
        "groupings" : [ ],
        "key" : "0_3",
        "label" : "September 2015",
        "value" : "2015-09-01"
      }, {
        "groupings" : [ ],
        "key" : "0_4",
        "label" : "October 2015",
        "value" : "2015-10-01"
      }, {
        "groupings" : [ ],
        "key" : "0_5",
        "label" : "November 2015",
        "value" : "2015-11-01"
      }, {
        "groupings" : [ ],
        "key" : "0_6",
        "label" : "December 2015",
        "value" : "2015-12-01"
      }, {
        "groupings" : [ ],
        "key" : "0_7",
        "label" : "March 2016",
        "value" : "2016-03-01"
      } ],
      "key" : "0",
      "label" : "Manufacturing",
      "value" : "Manufacturing"
    }, {
```

```
    "groupings" : [ {
      "groupings" : [ ],
      "key" : "1_0",
      "label" : "February 2013",
      "value" : "2013-02-01"
    }, {
      "groupings" : [ ],
      "key" : "1_1",
      "label" : "February 2015",
      "value" : "2015-02-01"
    }, {
      "groupings" : [ ],
      "key" : "1_2",
      "label" : "September 2015",
      "value" : "2015-09-01"
    }, {
      "groupings" : [ ],
      "key" : "1_3",
      "label" : "February 2016",
      "value" : "2016-02-01"
    }, {
      "groupings" : [ ],
      "key" : "1_4",
      "label" : "April 2016",
      "value" : "2016-04-01"
    } ],
    "key" : "1",
    "label" : "Media",
    "value" : "Media"
  }, {
    "groupings" : [ {
      "groupings" : [ ],
      "key" : "2_0",
      "label" : "November 2015",
      "value" : "2015-11-01"
    }, {
      "groupings" : [ ],
      "key" : "2_1",
      "label" : "December 2015",
      "value" : "2015-12-01"
    }, {
      "groupings" : [ ],
      "key" : "2_2",
      "label" : "March 2016",
      "value" : "2016-03-01"
    }, {
      "groupings" : [ ],
      "key" : "2_3",
      "label" : "May 2016",
      "value" : "2016-05-01"
    }, {
      "groupings" : [ ],
      "key" : "2_4",
      "label" : "June 2016",
```

```
            "value" : "2016-06-01"
          } ],
          "key" : "2",
          "label" : "Technology",
          "value" : "Technology"
        } ]
      },
      "hasDetailRows" : false,
      "reportExtendedMetadata" : {
        "aggregateColumnInfo" : {
          "s!AMOUNT" : {
            "dataType" : "currency",
            "label" : "Sum of Amount"
          }
        },
        "detailColumnInfo" : { },
        "groupingColumnInfo" : {
          "INDUSTRY" : {
            "dataType" : "picklist",
            "groupingLevel" : 0,
            "label" : "Industry"
          },
          "CLOSE_DATE" : {
            "dataType" : "date",
            "groupingLevel" : 0,
            "label" : "Close Date"
          }
        }
      },
      "reportMetadata" : {
        "aggregates" : [ "s!AMOUNT" ],
        "buckets" : [ {
          "bucketType" : "picklist",
          "devloperName" : "BucketField_47575792",
          "label" : "Industry",
          "nullTreatedAsZero" : false,
          "otherBucketLabel" : null,
          "sourceColumnName" : "INDUSTRY",
          "values" : [ {
            "label" : "Technology",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Agriculture", "Apparel", "Banking",
"Biotechnology", "Chemicals", "Communications", "Construction", "Consulting", "Education",
 "Electronics" ]
          }, {
            "label" : "Energy",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Energy", "Engineering", "Entertainment",
"Environmental", "Finance", "Food & Beverage", "Government", "Healthcare", "Hospitality",
 "Insurance", "Machinery", "Manufacturing" ]
          }, {
            "label" : "Healthcare",
            "rangeUpperBound" : null,
           "sourceDimensionValues" : [ "Media", "Not For Profit", "Other", "Recreation",
```

```
 "Retail", "Shipping", "Technology", "Telecommunications", "Transportation", "Utilities"
 ]
          } ]
        }, {
          "bucketType" : "picklist",
          "devloperName" : "BucketField_36625466",
          "label" : "Stage",
          "nullTreatedAsZero" : false,
          "otherBucketLabel" : null,
          "sourceColumnName" : "STAGE_NAME",
          "values" : [ {
            "label" : "Early",
            "rangeUpperBound" : null,
           "sourceDimensionValues" : [ "Prospecting", "Qualification", "Needs Analysis"
 ]
          }, {
            "label" : "Late",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Value Proposition", "Id. Decision Makers",
"Perception Analysis", "Proposal/Price Quote", "Negotiation/Review" ]
          }, {
            "label" : "Won",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Closed Won" ]
          }, {
            "label" : "Lost",
            "rangeUpperBound" : null,
            "sourceDimensionValues" : [ "Closed Lost" ]
          } ]
        } ],
        "chart" : null,
        "crossFilters" : [ ],
        "currency" : null,
        "description" : null,
        "detailColumns" : [ ],
        "developerName" : "Pipeline_By_Industry1",
        "division" : null,
        "folderId" : "005R0000000Hv5rIAC",
        "groupingsAcross" : [ ],
        "groupingsDown" : [ {
          "dateGranularity" : "None",
          "name" : "INDUSTRY",
          "sortAggregate" : null,
          "sortOrder" : "Asc"
        }, {
          "dateGranularity" : "Month",
          "name" : "CLOSE_DATE",
          "sortAggregate" : null,
          "sortOrder" : "Asc"
        } ],
        "hasDetailRows" : true,
        "hasRecordCount" : false,
        "historicalSnapshotDates" : [ ],
        "id" : "00OR0000000OgsOMAS",
```

```
      "name" : "Copy of Pipeline By Industry",
      "reportBooleanFilter" : null,
      "reportFilters" : [ {
        "column" : "ACCOUNT_TYPE",
        "isRunPageEditable" : false,
        "operator" : "lessOrEqual",
        "value" : "Integrator,Partner,Prospect"
      }, {
        "column" : "INDUSTRY",
        "isRunPageEditable" : true,
        "operator" : "notEqual",
        "value" : ""
      } ],
      "reportFormat" : "SUMMARY",
      "reportType" : {
        "label" : "Opportunities",
        "type" : "Opportunity"
      },
      "scope" : "organization",
      "showGrandTotal" : true,
      "showSubtotals" : true,
      "sortBy" : [ ],
      "standardDateFilter" : {
        "column" : "CLOSE_DATE",
        "durationValue" : "CUSTOM",
        "endDate" : null,
        "startDate" : null
      },
      "standardFilters" : [ {
        "name" : "open",
        "value" : "all"
      }, {
        "name" : "probability",
        "value" : ">0"
      } ]
    }
  },
  "status" : {
    "dataStatus" : "DATA",
    "errorCode" : null,
    "errorMessage" : null,
    "errorSeverity" : null,
    "refreshDate" : "2016-03-22T18:24:39.000+0000",
    "refreshStatus" : "IDLE"
  }
} ],
"dashboardMetadata" : {
  "canChangeRunningUser" : false,
  "components" : [ {
    "componentData" : 0,
    "footer" : null,
    "header" : "Pipeline This Quarter",
    "id" : "01aR00000005aT4IAI",
    "properties" : {
```

```
      "aggregates" : [ {
        "name" : "s!AMOUNT"
      } ],
      "autoSelectColumns" : false,
      "filterColumns" : [ ],
      "groupings" : null,
      "maxRows" : null,
      "sort" : null,
      "useReportChart" : false,
      "visualizationProperties" : {
        "breakPoints" : [ {
          "aggregateName" : "s!AMOUNT",
          "breaks" : [ {
            "color" : "c23934",
            "lowerBound" : 0,
            "upperBound" : 200000
          }, {
            "color" : "ffb75d",
            "lowerBound" : 200000,
            "upperBound" : 400000
          }, {
            "color" : "00716b",
            "lowerBound" : 400000,
            "upperBound" : 600000
          } ]
        } ],
        "showPercentages" : true,
        "showTotal" : true
      },
      "visualizationType" : "Gauge"
    },
    "reportId" : "00OR0000000K2UeMAK",
    "title" : null,
    "type" : "Report"
  }, {
    "componentData" : 1,
    "footer" : null,
    "header" : "Pipeline by Industry",
    "id" : "01aR00000005aT5IAI",
    "properties" : {
      "aggregates" : [ {
        "name" : "s!AMOUNT"
      } ],
      "autoSelectColumns" : false,
      "filterColumns" : [ ],
      "groupings" : [ {
        "name" : "INDUSTRY"
      } ],
      "maxRows" : null,
      "sort" : {
        "column" : "INDUSTRY",
        "sortOrder" : "asc"
      },
      "useReportChart" : false,
```

```
        "visualizationProperties" : {
          "combineSmallGroups" : false,
          "legendPosition" : "Bottom",
          "showPercentages" : false,
          "showTotal" : false,
          "showValues" : false
        },
        "visualizationType" : "Donut"
      },
      "reportId" : "00OR0000000OgsOMAS",
      "title" : null,
      "type" : "Report"
    } ],
    "description" : null,
    "developerName" : "yTtOilrkFGewFKpFUOscDuukUApfxH",
    "filters" : [ ],
    "folderId" : "00lR0000000DnRZIA0",
    "id" : "01ZR00000008h2EMAQ",
    "layout" : {
      "components" : [ {
        "colspan" : 3,
        "column" : 0,
        "row" : 0,
        "rowspan" : 4
      }, {
        "colspan" : 3,
        "column" : 0,
        "row" : 4,
        "rowspan" : 4
      } ],
      "gridLayout" : true,
      "numColumns" : 9,
      "rowHeight" : 80
    },
    "name" : "Liz's Sales Manager Dashboard",
    "runningUser" : {
      "displayName" : "Vandelay Art",
      "id" : "005R0000000Hv5rIAC"
    }
  }
}
```


Get Dashboard Metadata

Get details about dashboard metadata using a GET request.

Use a GET request on the Dashboard Describe resource to get metadata for the specified dashboard, including dashboard components, filters, layout, and the running user.

Example Usage

```
/services/data/v37.0/analytics/dashboards/01ZR00000004SknMAE/describe
```

Example Response Body


```
{
  "canChangeRunningUser" : true,
  "components" : [ {
    "componentData" : 0,
    "footer" : null,
    "header" : null,
    "id" : "01aR00000005kCmIAI",
    "properties" : {
      "aggregates" : [ {
        "name" : "s!AMOUNT"
      } ],
      "autoSelectColumns" : true,
      "filterColumns" : [ {
        "label" : "Closed",
        "name" : "CLOSED"
      }, {
        "label" : "Account Type",
        "name" : "ACCOUNT_TYPE"
      }, {
        "label" : "Annual Revenue",
        "name" : "SALES"
      } ],
      "groupings" : [ {
        "name" : "STAGE_NAME"
      } ],
      "maxRows" : null,
      "sort" : {
        "column" : "STAGE_NAME",
        "sortOrder" : "asc"
      },
      "useReportChart" : false,
      "visualizationProperties" : {
        "axisRange" : {
          "max" : null,
          "min" : null,
          "rangeType" : "auto"
        },
        "groupByType" : "cumulative",
        "legendPosition" : "Bottom",
        "showValues" : false
      },
      "visualizationType" : "Line"
    },
    "reportId" : "00OR0000000JizXMAS",
    "title" : null,
    "type" : "Report"
  }, {
    "componentData" : 1,
    "footer" : null,
    "header" : null,
    "id" : "01aR00000005awVIAQ",
    "properties" : {
```

```
      "aggregates" : [ {
        "name" : "s!AMOUNT"
      } ],
      "autoSelectColumns" : true,
      "filterColumns" : [ {
        "label" : "Closed",
        "name" : "CLOSED"
      }, {
        "label" : "Account Type",
        "name" : "ACCOUNT_TYPE"
      }, {
        "label" : "Annual Revenue",
        "name" : "SALES"
      } ],
      "groupings" : [ {
        "name" : "STAGE_NAME"
      } ],
      "maxRows" : null,
      "sort" : {
        "column" : "STAGE_NAME",
        "sortOrder" : "asc"
      },
      "useReportChart" : false,
      "visualizationProperties" : {
        "combineSmallGroups" : true,
        "legendPosition" : "Bottom",
        "showPercentages" : false,
        "showValues" : true
      },
      "visualizationType" : "Funnel"
    },
    "reportId" : "00OR0000000OFXeMAO",
    "title" : null,
    "type" : "Report"
  }, {
    "componentData" : 2,
    "footer" : null,
    "header" : null,
    "id" : "01aR00000005awTIAQ",
    "properties" : {
      "aggregates" : [ {
        "name" : "s!AMOUNT"
      } ],
      "autoSelectColumns" : true,
      "filterColumns" : [ {
        "label" : "Closed",
        "name" : "CLOSED"
      }, {
        "label" : "Account Type",
        "name" : "ACCOUNT_TYPE"
      }, {
        "label" : "Annual Revenue",
        "name" : "SALES"
      } ],
```

```
    "groupings" : null,
    "maxRows" : null,
    "sort" : null,
    "useReportChart" : false,
    "visualizationProperties" : {
      "breakPoints" : [ {
        "aggregateName" : "s!AMOUNT",
        "breaks" : [ {
          "color" : "c25454",
          "lowerBound" : 100000,
          "upperBound" : 300000
        }, {
          "color" : "c2c254",
          "lowerBound" : 300000,
          "upperBound" : 800000
        }, {
          "color" : "54c254",
          "lowerBound" : 800000,
          "upperBound" : 1000000
        } ]
      } ],
      "showPercentages" : false,
      "showTotal" : false
    },
    "visualizationType" : "Gauge"
  },
  "reportId" : "00OR0000000JizXMAS",
  "title" : null,
  "type" : "Report"
}, {
  "componentData" : 3,
  "footer" : null,
  "header" : null,
  "id" : "01aR00000005kCnIAI",
  "properties" : {
    "aggregates" : [ {
      "name" : "s!AMOUNT"
    }, {
      "name" : "a!AMOUNT"
    } ],
    "autoSelectColumns" : false,
    "filterColumns" : [ {
      "label" : "Closed",
      "name" : "CLOSED"
    }, {
      "label" : "Account Type",
      "name" : "ACCOUNT_TYPE"
    }, {
      "label" : "Annual Revenue",
      "name" : "SALES"
    } ],
    "groupings" : [ {
      "name" : "STAGE_NAME"
    }, {
```

```
      "name" : "TYPE"
    } ],
    "maxRows" : null,
    "sort" : {
      "column" : "STAGE_NAME",
      "sortOrder" : "asc"
    },
    "useReportChart" : false,
    "visualizationProperties" : {
      "axisRange" : {
        "max" : null,
        "min" : null,
        "rangeType" : "auto"
      },
      "groupByType" : "grouped",
      "legendPosition" : "Bottom"
    },
    "visualizationType" : "Scatter"
  },
  "reportId" : "00OR0000000JizXMAS",
  "title" : null,
  "type" : "Report"
}, {
  "componentData" : 4,
  "footer" : null,
  "header" : "My Table",
  "id" : "01aR00000005awUIAQ",
  "properties" : {
    "aggregates" : [ {
      "name" : "s!AMOUNT"
    } ],
    "autoSelectColumns" : false,
    "filterColumns" : [ {
      "label" : "Closed",
      "name" : "CLOSED"
    }, {
      "label" : "Account Type",
      "name" : "ACCOUNT_TYPE"
    }, {
      "label" : "Annual Revenue",
      "name" : "SALES"
    } ],
    "groupings" : [ {
      "name" : "INDUSTRY"
    }, {
      "name" : "CLOSE_DATE"
    } ],
    "maxRows" : null,
    "sort" : {
      "column" : "INDUSTRY",
      "sortOrder" : "asc"
    },
    "useReportChart" : false,
    "visualizationProperties" : {
```

```
      "breakPoints" : [ {
        "aggregateName" : "s!AMOUNT",
        "breaks" : [ {
          "color" : "c25454",
          "lowerBound" : null,
          "upperBound" : null
        }, {
          "color" : "c2c254",
          "lowerBound" : null,
          "upperBound" : null
        }, {
          "color" : "54c254",
          "lowerBound" : null,
          "upperBound" : null
        } ]
      } ],
      "tableColumns" : [ {
        "column" : "INDUSTRY",
        "isPercent" : false,
        "scale" : null,
        "showTotal" : false,
        "type" : "grouping"
      }, {
        "column" : "CLOSE_DATE",
        "isPercent" : false,
        "scale" : null,
        "showTotal" : false,
        "type" : "grouping"
      }, {
        "column" : "s!AMOUNT",
        "isPercent" : false,
        "scale" : null,
        "showTotal" : true,
        "type" : "aggregate"
      } ]
    },
    "visualizationType" : "Table"
  },
  "reportId" : "00OR0000000OgsOMAS",
  "title" : "My Table",
  "type" : "Report"
}, {
  "componentData" : 5,
  "footer" : null,
  "header" : null,
  "id" : "01aR00000005kCoIAI",
  "properties" : {
    "aggregates" : [ {
      "name" : "s!AMOUNT"
    } ],
    "autoSelectColumns" : false,
    "filterColumns" : [ {
      "label" : "Closed",
      "name" : "CLOSED"
```

```
    }, {
      "label" : "Account Type",
      "name" : "ACCOUNT_TYPE"
    }, {
      "label" : "Annual Revenue",
      "name" : "SALES"
    } ],
    "groupings" : [ {
      "name" : "STAGE_NAME"
    }, {
      "name" : "TYPE"
    } ],
    "maxRows" : null,
    "sort" : {
      "column" : "STAGE_NAME",
      "sortOrder" : "asc"
    },
    "useReportChart" : false,
    "visualizationProperties" : {
      "aggregateVisualizationInfos" : [ {
        "axis" : "Y2",
        "visualizationType" : "Column"
      } ],
      "axisRange" : {
        "max" : null,
        "min" : null,
        "rangeType" : "auto"
      },
      "groupByType" : "grouped",
      "legendPosition" : "Bottom",
      "showValues" : false
    },
    "visualizationType" : "Column"
  },
  "reportId" : "00OR0000000JizXMAS",
  "title" : null,
  "type" : "Report"
}, {
  "componentData" : 6,
  "footer" : null,
  "header" : null,
  "id" : "01aR00000005kCpIAI",
  "properties" : {
    "aggregates" : [ {
      "name" : "s!AMOUNT"
    }, {
      "name" : "a!AMOUNT"
    } ],
    "autoSelectColumns" : false,
    "filterColumns" : [ {
      "label" : "Closed",
      "name" : "CLOSED"
    }, {
      "label" : "Account Type",
```

```
      "name" : "ACCOUNT_TYPE"
    }, {
      "label" : "Annual Revenue",
      "name" : "SALES"
    } ],
    "groupings" : [ {
      "name" : "STAGE_NAME"
    } ],
    "maxRows" : null,
    "sort" : {
      "column" : "STAGE_NAME",
      "sortOrder" : "asc"
    },
    "useReportChart" : false,
    "visualizationProperties" : {
      "axisRange" : {
        "max" : null,
        "min" : null,
        "rangeType" : "auto"
      },
      "groupByType" : "none",
      "legendPosition" : "Bottom",
      "showValues" : false
    },
    "visualizationType" : "Bar"
  },
  "reportId" : "00OR0000000JizXMAS",
  "title" : null,
  "type" : "Report"
} ],
"description" : null,
"developerName" : "Filtered_Dashboard",
"filters" : [ {
  "errorMessage" : null,
  "id" : "0IBR00000004CElOAM",
  "name" : "Closed",
  "options" : [ {
    "alias" : "Open",
    "endValue" : null,
    "id" : "0ICR00000004CG4OAM",
    "operation" : "equals",
    "startValue" : null,
    "value" : "True"
  }, {
    "alias" : "Closed",
    "endValue" : null,
    "id" : "0ICR00000004CG5OAM",
    "operation" : "equals",
    "startValue" : null,
    "value" : "False"
  } ],
  "selectedOption" : null
}, {
  "errorMessage" : null,
```

```
    "id" : "0IBR00000004CEmOAM",
    "name" : "Account Type",
    "options" : [ {
      "alias" : null,
      "endValue" : null,
      "id" : "0ICR00000004CG6OAM",
      "operation" : "equals",
      "startValue" : null,
      "value" : "Analyst"
    }, {
      "alias" : null,
      "endValue" : null,
      "id" : "0ICR00000004CG7OAM",
      "operation" : "equals",
      "startValue" : null,
      "value" : "Competitor"
    }, {
      "alias" : null,
      "endValue" : null,
      "id" : "0ICR00000004CG8OAM",
      "operation" : "equals",
      "startValue" : null,
      "value" : "Press,Prospect,Reseller"
    }, {
      "alias" : null,
      "endValue" : null,
      "id" : "0ICR00000004CG9OAM",
      "operation" : "notEqual",
      "startValue" : null,
      "value" : "Other"
    }, {
      "alias" : "Outsiders",
      "endValue" : null,
      "id" : "0ICR00000004CGAOA2",
      "operation" : "lessOrEqual",
      "startValue" : null,
      "value" : "Integrator,Partner,Prospect"
    } ],
    "selectedOption" : null
  }, {
    "errorMessage" : null,
    "id" : "0IBR0000000007cOAA",
    "name" : "Annual Revenue",
    "options" : [ {
      "alias" : null,
      "endValue" : null,
      "id" : "0ICR000000000A5OAI",
      "operation" : "lessThan",
      "startValue" : null,
      "value" : "\"400,000\""
    } ],
    "selectedOption" : null
  } ],
  "folderId" : "00lR0000000DnRZIA0",
```

```
  "id" : "01ZR00000004SknMAE",
  "layout" : {
    "columns" : [ {
      "components" : [ 0, 1, 2 ]
    }, {
      "components" : [ 3, 4 ]
    }, {
      "components" : [ 5, 6 ]
    } ],
    "gridLayout" : false
  },
  "name" : "Filtered Dashboard",
  "runningUser" : {
    "displayName" : "Vandelay Art",
    "id" : "005R0000000Hv5rIAC"
  }
}
```

Clone a Dashboard

Creates a copy of a dashboard by sending a POST request to the Dashboard List resource.

Example

You want to clone dashboard 01ZR00000008gkvMAA and save it in a new folder with ID 00lR0000000DnRZIA0.

This POST request `/services/data/v35.0/analytics/dashboards/?cloneId=01ZR00000008gkvMAA` to the Dashboard List resource clones the dashboard.

```
{"folderId":"00lR0000000DnRZIA0"}
```

The response to the POST request returns the following details about the cloned dashboard.

```
{ "attributes" :
  {  "dashboardId" : "01ZR00000004SZZMA2",
     "dashboardName" : "Sales Manager Dashboard",
     "statusUrl" : "/services/data/v35.0/analytics/dashboards/01ZR00000004SZZMA2/status",

     "type" : "Dashboard" },
...
  "folderId" : "00lR0000000DnRZIA0",
  "id" : "01ZR00000004SZZMA2",
  "layout" : {
    "columns" : [
      { "components" : [ 0, 1, 2, 3 ] },
      { "components" : [ 4, 5, 6 ] },
      { "components" : [ 7 ] } ],
    "gridLayout" : false },
  "name" : "Sales Manager Dashboard",
  "runningUser" : { "displayName" : "Fred Wiliamson", "id" : "005R0000000Hv5rIAC" }
}
```

Delete a Dashboard

Delete a dashboard by sending a DELETE request to the Dashboard Results resource. Deleted dashboards are moved to the Recycle Bin.

Example

This DELETE request `/services/data/v34.0/analytics/dashboards/01ZD00000007S89MAE` to the Dashboard Results resource deletes the dashboard and returns a 204 HTTP response code with no content in the response body.

Downloads Examples

Learn how to download dashboards, lenses, and reports as images or PDFs.

Download a CRM Analytics Dashboard as a PDF
Download a CRM Analytics dashboard as a PDF.

Download a CRM Analytics Lens as a PNG
Download a CRM Analytics lens as an image.

Download a Lightning Experience Dashboard as a PNG
Download a Lightning Experience dashboard as an image.

Download a Lightning Experience Report as a PNG
Download a Lightning Experience report as a `.png` file.

Download a CRM Analytics Dashboard as a PDF

Download a CRM Analytics dashboard as a PDF.

Use a request on the Analytics Download resource to download a CRM Analytics dashboard as a `.pdf` binary file.

Note: Downloads are requested by entering the URI in a browser address bar.

Example Usage

```
<domain>/analytics/download/dashboard/0FKB0000000xxxxxx.pdf
```

Parameter	Description
`assetType`	Required. Specifies what type of Analytics asset to download. Valid values are: • `dashboard` • `lens` • `lightning-dashboard` • `report`
`assetId`	Required. Specifies the Analytics asset id to download.
`downloadType`	Required. Specifies what file type to download the Analytics asset as. Valid values are: • `png`

Parameter	Description
	• `pdf`

Example Response Body

The response body is binary data of the `.pdf` representation of the CRM Analytics dashboard.

Download a CRM Analytics Lens as a PNG

Download a CRM Analytics lens as an image.

Use a request on the Analytics Download resource to download a CRM Analytics lens as a `.png` binary file.

Note: Downloads are requested by entering the URI in a browser address bar.

Example Usage

```
<domain>/analytics/download/lens/0FKB0000000xxxxxx.png
```

Parameter	Description
`assetType`	Required. Specifies what type of Analytics asset to download. Valid values are: • `dashboard` • `lens` • `lightning-dashboard` • `report`
`assetId`	Required. Specifies the Analytics asset id to download.
`downloadType`	Required. Specifies what file type to download the Analytics asset as. Valid values are: • `png` • `pdf`

Example Response Body

The response body is binary data of the `.png` representation of the CRM Analytics lens.

Download a Lightning Experience Dashboard as a PNG

Download a Lightning Experience dashboard as an image.

Use a request on the Analytics Download resource to download a Lightning Experience dashboard as a `.png` binary file.

Note: Downloads are requested by entering the URI in a browser address bar.

Example Usage

```
<domain>/analytics/download/lightning-dashboard/01ZB0000000xxxxxx.png
```

Parameter	Description
`assetType`	Required. Specifies what type of Analytics asset to download. Valid values are: • `dashboard` • `lens` • `lightning-dashboard` • `report`
`assetId`	Required. Specifies the Analytics asset id to download.
`downloadType`	Required. Specifies what file type to download the Analytics asset as. Valid values are: • `png` • `pdf`

Example Response Body

The response body is binary data of the `.png` representation of the Lightning Experience dashboard.

Download a Lightning Experience Report as a PNG

Download a Lightning Experience report as a `.png` file.

Use a request on the Analytics Download resource to download a Lightning Experience report as a `.png` binary file.

Note: Downloads are requested by entering the URI in a browser address bar.

Example Usage

```
<domain>/analytics/download/report/00OB0000000xxxxxx.pdf
```

Parameter	Description
`assetType`	Required. Specifies what type of Analytics asset to download. Valid values are: • `dashboard` • `lens` • `lightning-dashboard` • `report`
`assetId`	Required. Specifies the Analytics asset id to download.
`downloadType`	Required. Specifies what file type to download the Analytics asset as. Valid values are: • `png` • `pdf`

Note: For a Lightning Experience report, the download request only works for `.png` when the report has a chart. If `.pdf` is used or the report doesn't have a chart, the request returns an error.

Example Response Body

The response body is binary data of the `.png` representation of the Lightning Experience report.

Notifications Examples

Learn how to refresh, create, edit, copy, and delete analytic notifications. Analytic notifications are surfaced in the Salesforce user interface as report subscriptions, dashboard subscriptions, or Analytics notifications.

Get Analytics Notifications
Return a list of analytics notifications using a GET request.

Create an Analytics Notification
Create an Analytics Notification using a POST request.

Save Changes to an Analytics Notification
Save Changes to an Analytics Notification using a PUT request.

Delete an Analytics Notification
Delete an Analytics Notification using a DELETE request. Once deleted, the analytics notification can't be recovered.

Check Limits for Analytics Notifications
Check analytics notification limits using a GET request.

Get Analytics Notifications

Return a list of analytics notifications using a GET request.

Use a GET request on the Analytics Notification List resource to return a list of analytics notifications.

Example Usage

```
/services/data/v38.0/analytics/notifications?source=lightningReportSubscribe
```

Parameter	Description
`source`	Required for `GET` calls. Specifies what type of analytics notification to return. Valid values are: • `lightningDashboardSubscribe` — dashboard subscriptions • `lightningReportSubscribe` — report subscriptions • `waveNotification` — Analytics notifications
`ownerId`	Optional for `GET` calls. Allows users with Manage Analytics Notifications permission to get notifications for another user with the specified `ownerId`.
`recordId`	Optional. Return notifications for a single record. Valid values are: • `reportId`— Unique report ID • `lensId`— Unique Analytics lens ID

Example Response Body


```
[ {
  "active" : true,
  "createdDate" : "2016-08-08T04:14:12Z",
  "deactivateOnTrigger" : false,
  "id" : "0AuR00000004CYpKAM",
  "lastModifiedDate" : "2016-08-08T04:14:12Z",
  "name" : "Notification1",
  "recordId" : "00OR0000000P7EgMAK",
  "schedule" : {
    "details" : {
      "time" : 3
    },
    "frequency" : "daily"
  },
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
}, {
  "active" : true,
  "createdDate" : "2016-08-10T22:22:17Z",
  "deactivateOnTrigger" : false,
  "id" : "0AuR000000000KSKAY",
  "lastModifiedDate" : "2016-08-11T23:16:01Z",
  "name" : "Notification2",
  "recordId" : "00OR0000000PCHYMA4",
  "schedule" : {
    "details" : {
      "daysOfMonth" : [ 1, 2, 4 ],
      "time" : 22
    },
    "frequency" : "monthly",
    "frequencyType" : "specific"
  },
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
```

```
}, {
  "active" : true,
  "createdDate" : "2016-08-12T04:01:50Z",
  "deactivateOnTrigger" : false,
  "id" : "0AuR000000000KcKAI",
  "lastModifiedDate" : "2016-08-12T04:16:34Z",
  "name" : "Notification3",
  "recordId" : "00OR0000000PBXEMA4",
  "schedule" : {
    "details" : {
      "dayInWeek" : "mon",
      "time" : 22,
      "weekInMonth" : "third"
    },
    "frequency" : "monthly",
    "frequencyType" : "relative"
  },
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
} ]
```

Create an Analytics Notification

Create an Analytics Notification using a POST request.

Use a POST request on the Analytics Notification List resource to create an analytics notification.

Example Usage

```
/services/data/v38.0/analytics/notifications
```

Example Request Body

```
{
  "active" : true,
  "createdDate" : "",
  "deactivateOnTrigger" : false,
  "id" : "",
  "lastModifiedDate" : "",
  "name" : "New Notification",
  "recordId" : "00OR0000000PD55MAG",
  "schedule" : {
    "details" : {
      "time" : 3
    },
    "frequency" : "daily"
  },
```

```
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
}
```

Example Response Body

```
{
  "active" : true,
  "createdDate" : "2016-08-12T05:57:19Z",
  "deactivateOnTrigger" : false,
  "id" : "0AuR00000004CZTKA2",
  "lastModifiedDate" : "2016-08-12T05:57:19Z",
  "name" : "New Notification",
  "recordId" : "00OR0000000PD55MAG",
  "schedule" : {
    "details" : {
      "time" : 3
    },
    "frequency" : "daily"
  },
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
}
```

Save Changes to an Analytics Notification

Save Changes to an Analytics Notification using a PUT request.

Use a PUT request on the Analytics Notification resource to save changes to an analytics notification.

Example Usage

```
/services/data/v38.0/analytics/notifications/analytics notification ID
```

Example Request Body

In this example, an analytics notification is changed so that it runs daily at 9:00 AM instead of 3:00 AM.

```
{
  "active" : true,
  "createdDate" : "",
  "deactivateOnTrigger" : false,
  "id" : "0AuR00000004CZTKA2",
  "lastModifiedDate" : "",
  "name" : "New Notification",
  "recordId" : "00OR0000000PD55MAG",
  "schedule" : {
    "details" : {
      "time" : 9
    },
    "frequency" : "daily"
  },
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
}
```

Example Response Body

The response body reflects the updated and saved analytics notifications.

```
{
  "active" : true,
  "createdDate" : "2016-08-12T05:57:19Z",
  "deactivateOnTrigger" : false,
  "id" : "0AuR00000004CZTKA2",
  "lastModifiedDate" : "2016-08-12T06:12:24Z",
  "name" : "New Notification",
  "recordId" : "00OR0000000PD55MAG",
  "schedule" : {
    "details" : {
      "time" : 9
    },
    "frequency" : "daily"
  },
  "source" : "lightningReportSubscribe",
  "thresholds" : [ {
    "actions" : [ {
      "configuration" : {
        "recipients" : [ ]
      },
      "type" : "sendEmail"
```

```
    } ],
    "conditions" : null,
    "type" : "always"
  } ]
}
```

Delete an Analytics Notification

Delete an Analytics Notification using a DELETE request. Once deleted, the analytics notification can't be recovered.

Use a DELETE request on the Analytics Notification resource to delete an analytics notification.

Example Usage

`/services/data/v38.0/analytics/notifications/`***`analytics notification ID`***

The analytic notification deletes and returns a 204 HTTP response code with no content in the response body.

Check Limits for Analytics Notifications

Check analytics notification limits using a GET request.

Use a GET request on the Analytics Notification Limits resource to check limits for analytics notifications.

Example Usage

`/services/data/v38.0/analytics/notifications/limits?source=waveNotification`

Method	Description
`GET`	Check how many analytic notifications you have, and the maximum number you can have.

Example Response Body

```
{
  "userLimit" : {
    "max" : 5,
    "remaining" : 2
  }
}
```

CHAPTER 3 Reference

In this chapter ...

- Analytics Download
- Analytics Notifications
- Dashboards
- Filter Operators
- Folders
- Reports
- Report Types

Curious about a property in the Reports and Dashboards REST API? This reference details each property, method, and URL parameter for each Reports and Dashboards REST API resource.

Analytics Download

Use the Analytics Download API to download images and PDFs of Analytics assets, including CRM Analytics dashboards and lenses and Lightning Experience dashboards and reports. The Analytics Download API is available in API version 55.0 and later.

Note: To use the Analytics Download API, your org must have a CRM Analytics license. In addition, your org needs both Slack for Salesforce and CRM Analytics for Slack enabled. For more information, see Enable Salesforce for Slack Integrations.

Resources for the Analytics Download API are available at ***domain***`/analytics/download`. Downloads are requested via browser calls.

Resource	Description
Analytics Download ***domain***`/analytics/download/`***assetType/assetId.downloadType***	When *`downloadType`* has a value of `png`, downloads a `.png` image of the specified CRM Analytics dashboard or lens, or of the specified Lightning report or dashboard. When *`downloadType`* has a value of `pdf`, downloads a `.pdf` file of the specified CRM Analytics dashboard or lens.

Analytics Download

Download a `.png` image of a CRM Analytics dashboard or lens, or Lightning Experience dashboard or report. Download a `.pdf` file of a CRM Analytics dashboard or lens. Request downloads via browser calls.

Syntax

URI

domain`/analytics/download/`***assetType/assetId.downloadType***

Note: To request a download, enter the URI in a browser address bar.

We don't support the use of this API from Apex.

Formats

`.png` or `.pdf`

Parameters

Parameter	Description
`assetType`	Required. Specifies what type of Analytics asset to download. Valid values are: • `dashboard` • `lens` • `lightning-dashboard` • `report`
`assetId`	Required. Specifies the Analytics asset id to download.
`downloadType`	Required. Specifies what file type to download the Analytics asset as. Valid values are: • `png` • `pdf`

Note: For Lightning Experience reports, the request works only with `png` and only if the report has a chart. If you use `pdf` or if the report doesn't have a chart, the request returns an error.

Response Body

The response body is binary data of the `.png` or `.pdf` representation of the Analytics asset.

Note: For limits on columns and pages in .pdf files, see Analytics Download Limits.

Analytics Notifications

Use the Analytics Notifications API to work set up custom analytics notifications. The Analytics Notifications API is available in API version 38.0 and later.

Resources for the Analytics Notifications API are available at `/services/data/<latest API version>/analytics/notifications`. You can query each resource with an `HTTP` method.

Resource	Supported HTTP Method	Description
Analytics Notification List `/services/data/<latest API version>/analytics/notifications`	`GET`	Returns a list of recent notifications.
	`POST`	Create an analytics notification.
Analytics Notification `/services/data/<latest API version>/analytics/notifications/<ID>`	`GET`	Returns information about a specific notification.
	`PUT`	Save changes to the notification as specified in the request body.
	`DELETE`	Delete the notification. Deleted notifications can't be recovered.
Analytics Notification Limits `/services/data/<latest API version>/analytics/notifications/limits`	`GET`	Check to see how many more analytics notifications you can create.

Analytics Notification List

Return a list of analytics notifications (`GET`) or create an analytics notification (`POST`).

Syntax

URI

`/services/data/vXX.X/analytics/notifications?source=source`

Formats

JSON

HTTP methods

Method	Description
`GET`	Returns a list of analytics notifications.
`POST`	Create an analytics notification.

Parameters

Parameter	Description
`source`	Required for `GET` calls. Specifies what type of analytics notification to return. Valid values are: • `lightningDashboardSubscribe` — dashboard subscriptions • `lightningReportSubscribe` — report subscriptions • `waveNotification` — Analytics notifications
`ownerId`	Optional for `GET` calls. Allows users with Manage Analytics Notifications permission to get notifications for another user with the specified `ownerId`.
`recordId`	Optional. Return notifications for a single record. Valid values are: • `reportId`— Unique report ID • `lensId`— Unique Analytics lens ID

GET and POST Response Body

An array of notification objects. Each object contains the following fields:

Property	Type	Description
`active`	Boolean	Indicates whether the notification is being sent (`true`) or not (`false`).
`configuration`	WaveConfiguration[]	Describes details of a Analytics notification. Only applicable when `source` is `waveNotification`.
`createdDate`	DateTime	Date and time when the notification was created (in ISO 8601 format).
`deactivateOnTrigger`	Boolean	Indicates whether the notification is deactivated after it's sent (`true`) or not (`false`). Deactivation doesn't delete the notification. The default value is `false`.
`id`	String	Unique notification ID.
`lastModifiedDate`	DateTime	Date and time when the notification was last modified (in ISO 8601 format).
`name`	String	Display name of the notification.
`recordId`	String	Unique ID of the record that the notification describes. Valid values are: • `reportId`

Property	Type	Description
		• `lensId`
`runAs`	runAs	The person who runs the report in a report subscription. Report recipients see data in the emailed report that this person has access to in Salesforce. Available in API version 40.0 and later. Only appears if you have the "Subscribe to Reports: Add Recipients" user perm.
`schedule`	Schedule	Details about the notification's schedule.
`source`	String	Indicates the type of notification. Possible values are: • `lightningSubscribe` — report subscriptions • `lightningDashboardSubscribe` — dashboard subscriptions • `lightningReportSubscribe` — report subscriptions • `waveNotification` — Analytics notifications
`thresholds`	Threshold[]	Specifies what happens when the notification runs. For example, sending an email with report results.

runAs

Property	Type	Description
`id`	String	The person's unique Salesforce user ID.
`name`	String	The person's first and last name.

Schedule

Property	Type	Description
`frequency`	String	How frequently the notification is invoked. Possible values are: • `daily` — Every day • `weekly` — One or more days each week • `monthly` — One or more days each month
`frequencyType`	String	Only necessary when `frequency` is `monthly`. Possible values are: • `relative` — Days which can change month-to-month, as described by `details`. • `specific` — Fixed monthly dates, as described by `details`.
`details`	ScheduleDetail[]	Describes the notification schedule. Varies depending on whether `frequency` is `daily`, `weekly`, or `monthly`.

ScheduleDetail (`frequency` is `daily`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.

ScheduleDetail (`frequency` is `weekly`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.
`daysOfWeek`	String[]	The days of the week on which the notification is invoked. Possible values are: • `mon` — Monday • `tue` — Tuesday • `wed` — Wednesday • `thu` — Thursday • `fri` — Friday • `sat` — Saturday • `sun` — Sunday

ScheduleDetail (`frequency` is `monthly`, `frequencyType` is `relative`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.
`weekInMonth`	String	The week in the month during which the notification is invoked. Possible values are: • `first` — First week • `second` — Second week • `third` — Third week • `fourth` — Fourth week
`dayInWeek`	String	The day of the week on which the notification is invoked. Possible values are: • `mon` — Monday • `tue` — Tuesday • `wed` — Wednesday • `thu` — Thursday

Property	Type	Description
		• `fri` — Friday • `sat` — Saturday • `sun` — Sunday • `weekday` — Weekday • `weekend` — Weekend day

ScheduleDetail (`frequency` is `monthly`, `frequencyType` is `specific`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.
`daysOfMonth`	Integer[]	The days of the month on which the notification is invoked. Possible values are integers from 1 to 31, and -1 (which represents the last day of the month).

Threshold

Property	Type	Description
`actions`	Action[]	Specifies what action is taken when the notification is invoked.
`conditions`	Condition[]	Describes conditions that govern when the notification is invoked.
`type`	String	Specifies when the notification is invoked (other than date and time criteria). Possible values are: • `always` — Always invoke the notification • `onError` — Invoke the notification when there is an error • `condition` — Invoke the notification based on criteria described by `conditions`

Condition

Property	Type	Description
`colName`	String	The data field which is operated on.
`value`	String	The comparison value which is used by the operation.
`operation`	String	The operation which is used to evaluate the condition. Possible values are: • `equal` — `colName` and `value` are equal • `notEqual` — `colName` and `value` are not equal • `greaterThan` — `colName` is greater than `value`

Property	Type	Description
		• `lessThan` — `colName` is less than `value` • `greaterThanEqual` — `colName` is greater than or equal to `value` • `lessThanEqual` — `colName` is less than or equal to `value`

Action

Property	Type	Description
`type`	String	The type of action to perform when the notification is invoked. Possible values are: • `postToSlack` — Post to a Slack channel • `sendEmail` — Send an email to `recipients`
`configuration`	Configuration[]	Specifies important attributes for resources related to the notification.

Configuration

Property	Type	Description
`attachment`	String	Specifies whether a Lightning Experience report subscription includes an attachment. If it includes an attachment, also specifies the file attachment. There is only one valid value: • `excel`—Attach report results to the email as a spreadsheet formatted as a `.XLSX` file. Do not include record-level details in the subscription email. If the Lightning report subscription does not include an attachment, then the `attachment` property is not returned. When the `attachment` property is not returned, HTML-formatted report results are included directly in the subscription email body.
`recipients`	Recipient[]	A list of users, roles, and groups who receive the notification.
`summaryOnly`	Boolean	Applies when threshold type is `condition` and `source=LightningReportSubscribe.`. If `true`, emails the notification summary without the report table. If `false` or `null`, emails the summary and report table.
`team`	Team	The team of notification recipients.

Recipient

Property	Type	Description
`id`	String	Specifies who receives the notification. Valid values are the unique id of a user, role, or group.
`displayName`	String	The `displayName` of the user, role, or group.
`type`	String	Type of recipient. Possible values are: • `collaborationRoom` — A collaboration room. • `user` — A individual user.

Team

Property	Type	Description
`platformId`	String	Specifies the id of the Slack platform.

WaveConfiguration

Property	Type	Description
`anchor`	String	Optional. The Id of the Analytics dashboard widget to which the notification is anchored.
`filter`	String	Optional. Description of selected filters at the time of notification creation.
`query`	String	Required. SAQL query which is run when the notification is invoked.
`datasets`	WaveDataset[]	Required. Collection of Analytics datasets referenced by the notification.

WaveDataset

Property	Type	Description
`id`	String	Required. Id of the Analytics dataset.
`name`	String	Optional. Developer name of the Analytics dataset.
`namespace`	String	Optional. Namespace of the Analytics dataset.

POST Request Body

Uses the same format as the GET and POST response body.

Analytics Notification

Get information about (`GET`), save changes to (`PUT`) or delete (`DELETE`) a specific analytics notification.

Syntax

URI

`/services/data/v`***`XX.X`***`/analytics/notifications/`***`analytics notification ID`***

Formats

JSON

HTTP methods

Method	Description
`GET`	Returns information about a specific notification.
`PUT`	Save changes to the analytics notification as specified in the request body.
`DELETE`	Delete the analytics notification. Deleted notifications can't be recovered.

Parameters

Parameter	Description
`source`	Required for `GET` calls. Specifies what type of analytics notification to return. Valid values are: • `lightningDashboardSubscribe` — dashboard subscriptions • `lightningReportSubscribe` — report subscriptions • `waveNotification` — Analytics notifications
`ownerId`	Optional for `GET` calls. Allows users with Manage Analytics Notifications permission to get notifications for another user with the specified `ownerId`.
`recordId`	Optional. Return notifications for a single record. Valid values are: • `reportId`— Unique report ID • `lensId`— Unique Analytics lens ID

GET Response Body

Property	Type	Description
`active`	Boolean	Indicates whether the notification is being sent (`true`) or not (`false`).
`configuration`	WaveConfiguration[]	Describes details of a Analytics notification. Only applicable when `source` is `waveNotification`.
`createdDate`	DateTime	Date and time when the notification was created (in ISO 8601 format).

Property	Type	Description
`deactivateOnTrigger`	Boolean	Indicates whether the notification is deactivated after it's sent (`true`) or not (`false`). Deactivation doesn't delete the notification. The default value is `false`.
`id`	String	Unique notification ID.
`lastModifiedDate`	DateTime	Date and time when the notification was last modified (in ISO 8601 format).
`name`	String	Display name of the notification.
`recordId`	String	Unique ID of the record that the notification describes. Valid values are: • `reportId` • `lensId`
`runAs`	runAs	The person who runs the report in a report subscription. Report recipients see data in the emailed report that this person has access to in Salesforce. Available in API version 40.0 and later. Only appears if you have the "Subscribe to Reports: Add Recipients" user perm.
`schedule`	Schedule	Details about the notification's schedule.
`source`	String	Indicates the type of notification. Possible values are: • `lightningSubscribe` — report subscriptions • `lightningDashboardSubscribe` — dashboard subscriptions • `lightningReportSubscribe` — report subscriptions • `waveNotification` — Analytics notifications
`thresholds`	Threshold[]	Specifies what happens when the notification runs. For example, sending an email with report results.

runAs

Property	Type	Description
`id`	String	The person's unique Salesforce user ID.
`name`	String	The person's first and last name.

Schedule

Property	Type	Description
`frequency`	String	How frequently the notification is invoked. Possible values are: • `daily` — Every day • `weekly` — One or more days each week

Property	Type	Description
		• `monthly` — One or more days each month
`frequencyType`	String	Only necessary when `frequency` is `monthly`. Possible values are: • `relative` — Days which can change month-to-month, as described by `details`. • `specific` — Fixed monthly dates, as described by `details`.
`details`	ScheduleDetail[]	Describes the notification schedule. Varies depending on whether `frequency` is `daily`, `weekly`, or `monthly`.

ScheduleDetail (`frequency` is `daily`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.

ScheduleDetail (`frequency` is `weekly`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.
`daysOfWeek`	String[]	The days of the week on which the notification is invoked. Possible values are: • `mon` — Monday • `tue` — Tuesday • `wed` — Wednesday • `thu` — Thursday • `fri` — Friday • `sat` — Saturday • `sun` — Sunday

ScheduleDetail (`frequency` is `monthly`, `frequencyType` is `relative`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.

Property	Type	Description
`weekInMonth`	String	The week in the month during which the notification is invoked. Possible values are: • `first` — First week • `second` — Second week • `third` — Third week • `fourth` — Fourth week
`dayInWeek`	String	The day of the week on which the notification is invoked. Possible values are: • `mon` — Monday • `tue` — Tuesday • `wed` — Wednesday • `thu` — Thursday • `fri` — Friday • `sat` — Saturday • `sun` — Sunday • `weekday` — Weekday • `weekend` — Weekend day

ScheduleDetail (`frequency` is `monthly`, `frequencyType` is `specific`)

Property	Type	Description
`time`	Integer	The hour of the day at which the notification is invoked. Possible values are integers from 0 to 23.
`daysOfMonth`	Integer[]	The days of the month on which the notification is invoked. Possible values are integers from 1 to 31, and -1 (which represents the last day of the month).

Threshold

Property	Type	Description
`actions`	Action[]	Specifies what action is taken when the notification is invoked.
`conditions`	Condition[]	Describes conditions that govern when the notification is invoked.
`type`	String	Specifies when the notification is invoked (other than date and time criteria). Possible values are: • `always` — Always invoke the notification • `onError` — Invoke the notification when there is an error

Property	Type	Description
		• `condition` — Invoke the notification based on criteria described by `conditions`

Condition

Property	Type	Description
`colName`	String	The data field which is operated on.
`value`	String	The comparison value which is used by the operation.
`operation`	String	The operation which is used to evaluate the condition. Possible values are: • `equal` — `colName` and `value` are equal • `notEqual` — `colName` and `value` are not equal • `greaterThan` — `colName` is greater than `value` • `lessThan` — `colName` is less than `value` • `greaterThanEqual` — `colName` is greater than or equal to `value` • `lessThanEqual` — `colName` is less than or equal to `value`

Action

Property	Type	Description
`type`	String	The type of action to perform when the notification is invoked. Possible values are: • `postToSlack` — Post to a Slack channel • `sendEmail` — Send an email to `recipients`
`configuration`	Configuration[]	Specifies important attributes for resources related to the notification.

Configuration

Property	Type	Description
`attachment`	String	Specifies whether a Lightning Experience report subscription includes an attachment. If it includes an attachment, also specifies the file attachment. There is only one valid value: • `excel`—Attach report results to the email as a spreadsheet formatted as a `.XLSX` file. Do not include record-level details in the subscription email.

Property	Type	Description
		If the Lightning report subscription does not include an attachment, then the `attachment` property is not returned. When the `attachment` property is not returned, HTML-formatted report results are included directly in the subscription email body.
`recipients`	Recipient[]	A list of users, roles, and groups who receive the notification.
`summaryOnly`	Boolean	Applies when threshold type is `condition` and `source=LightningReportSubscribe.`. If `true`, emails the notification summary without the report table. If `false` or `null`, emails the summary and report table.
`team`	Team	The team of notification recipients.

Recipient

Property	Type	Description
`id`	String	Specifies who receives the notification. Valid values are the unique id of a user, role, or group.
`displayName`	String	The `displayName` of the user, role, or group.
`type`	String	Type of recipient. Possible values are: • `collaborationRoom` — A collaboration room. • `user` — A individual user.

Team

Property	Type	Description
`platformId`	String	Specifies the id of the Slack platform.

WaveConfiguration

Property	Type	Description
`anchor`	String	Optional. The Id of the Analytics dashboard widget to which the notification is anchored.
`filter`	String	Optional. Description of selected filters at the time of notification creation.
`query`	String	Required. SAQL query which is run when the notification is invoked.
`datasets`	WaveDataset[]	Required. Collection of Analytics datasets referenced by the notification.

WaveDataset

Property	Type	Description
`id`	String	Required. Id of the Analytics dataset.
`name`	String	Optional. Developer name of the Analytics dataset.
`namespace`	String	Optional. Namespace of the Analytics dataset.

PUT Request Body

A notification object with desired changes.

Uses the same format as the GET response body.

PUT Response Body

An analytics notification object reflecting saved changes.

Uses the same format as the GET response body.

DELETE Response Body

The analytics notification is deleted, and can't be recovered.

Returns an empty response body.

Analytics Notification Limits

Check to see how many more analytics notifications you can create.

Syntax

URI

`/services/data/v`***`XX.X`***`/analytics/notifications/limits?source=source`

Formats

JSON

HTTP methods

Method	Description
`GET`	Check how many analytic notifications you have, and the maximum number you can have.

Parameters

Parameter	Description
`source`	Required for `GET` calls. Specifies what type of analytics notification to return. Valid values are: • `lightningDashboardSubscribe` — dashboard subscriptions • `lightningReportSubscribe` — report subscriptions • `waveNotification` — Analytics notifications
`recordId`	Optional. Return notifications for a single record. Valid values are: • `reportId`— Unique report ID • `lensId`— Unique Analytics lens ID

GET Response Body

Property	Type	Description
`max`	Integer	How many analytics notifications of the type specified by `source` the user is allowed to create.
`remaining`	Integer	How many more analytics notifications of the type specified by `source` the user can create before hitting the limit.

Dashboards

The Dashboards API provides several resources for accessing and refreshing dashboards.

Resources for the Dashboards API are available at `/services/data/`***`<latest API version>`***`/analytics/dashboards`. You can query each resource with an HTTP method (such as GET). Use these resources to integrate dashboard data directly into your applications.

Resource	Supported HTTP Method	Description
Dashboard List	GET	Returns a list of recently used dashboards.
	POST	Makes a copy of a dashboard.
Dashboard Results	GET	Returns the metadata, data, and status for the specified dashboard.
	POST	Returns details about specified dashboard components.
	PUT	Triggers a dashboard refresh.
	PATCH	Saves a dashboard.
	DELETE	Deletes a dashboard.
Dashboard Status	GET	Returns the status for the specified dashboard.

Resource	Supported HTTP Method	Description
Dashboard Describe	GET	Returns metadata for the specified dashboard, including dashboard components, filters, layout, and the running user.
Dashboard Filter Options Analysis	POST	Verifies that dashboard filter options are compatible with report fields. Specify the `reportId` of a dashboard's components' source report.

Dashboard List

Returns a list of recently used dashboards or clones a dashboard.

Syntax

URI

```
/services/data/vXX.X/analytics/dashboards
```

Formats

JSON

HTTP methods

Method	Description
GET	Returns a list of dashboards that were recently viewed by the API user. See this example.
POST	Makes a copy of a dashboard. See this example.

Authentication

```
Authorization: Bearer token
```

GET Response body

An array of recent dashboard objects. Each object contains the following fields:

Property	Type	Description
`id`	String	Unique identifier of the dashboard.
`name`	String	Localized display name of the dashboard.
`statusUrl`	String	Dashboard status URL.
`url`	String	Dashboard result URL.

POST Response Body

Uses the same format as the GET and PUT responses for the resource.

Dashboard Results

Can return metadata, data, and status for the specified dashboard. Can also refresh, save, or delete a dashboard.

Syntax

URI

```
/services/data/vXX.X/analytics/dashboards/dashboardID
```

Or, with optional parameters:

```
/services/data/vXX.X/analytics/dashboards/dashboardID?runningUser=runningUserID&filter1=filter1ID&filter2=filter2ID&filter3=filter3ID
```

Formats

JSON

HTTP methods

Method	Description
GET	Returns metadata, data, and status for the specified dashboard. See this example.
POST	Returns details about one or more dashboard components from a specified dashboard. See this example.
PUT	Triggers a dashboard refresh. See this example.
PATCH	Saves a dashboard. See this example.
DELETE	Deletes a dashboard. See this example.

Authentication

```
Authorization: Bearer token
```

Parameters

The following optional parameters can be used with the GET and PUT methods:

Parameter Name	Description
`runningUser`	Identifier of the running user. Gives an error if the user is not allowed to change the running user, or if the selected running user is invalid.
`filter1`	Identifier of the selected filter option for the first filter. Gives an error if the filter option is invalid.
`filter2`	Identifier of the selected filter option for the second filter. Gives an error if the filter option is invalid.
`filter3`	Identifier of the selected filter option for the third filter. Gives an error if the filter option is invalid.
`isStickyFilterSave`	Append to a PATCH request. When `true`, saves any dashboard filters set in the request so that they're also set the next time you open the dashboard. You can only set dashboard filters for yourself, not for other users.

GET, POST, and PUT Response body

Property	Type	Description
`componentData`	Component data[]	Ordered array containing data and status for each component of the dashboard.
`dashboardMetadata`	Dashboard metadata	Metadata for the entire dashboard.

Attributes

Property	Type	Description
`dashboardId`	String	Unique identifier of dashboard.
`dashboardName`	String	Dashboard name.
`statusUrl`	Url	The URL of the status resource for the dashboard.
`type`	String	This property is always set to `Dashboard`.

Component data

Property	Type	Description
`componentId`	String	Unique identifier of the component.
`reportResult`	Report results	Report metadata and summary data for the dashboard component. Uses the same data format as the Report API.
`status`	Component status	Queue and data status of the component.

Component status

Property	Type	Description
`dataStatus`	String	Status of the data set of the component. Value can be: • `NODATA`: The data set was never generated or is invalid due to a change in the report. • `DATA`: The data set is available and was last refreshed at the `refreshDate`. • `ERROR`: A component error has occurred. Details can be found in `errorCode`, `errorMessage`, and `errorSeverity`.
`errorCode`	String	Unique identifier of error message. This property is only populated in case of error.
`errorMessage`	String	Localized error message. This property is only populated in case of error.
`errorSeverity`	String	Severity of error code and message. Value can be: • `Error`

Property	Type	Description
		• `Warning` This property is only populated in case of error.
`refreshDate`	Date and time string	Date and time of last refresh in ISO-8601 format.
`refreshStatus`	String	Refresh status of the component. Value can be: • `IDLE`: The component is not currently being refreshed. • `RUNNING`: The component is currently being refreshed.

Dashboard metadata

Property	Type	Description
`attributes`	Attributes	Attributes for the dashboard resource, such as name, identifier, and references to other related resources.
`canChangeRunningUser`	Boolean	Indicates whether the user is allowed to select a specific running user. Always `true` for team dashboards.
`canUseStickyFilter`	Boolean	Indicates whether dashboard filters persist after closing the dashboard (`true`) or not (`false`). Filters that persist keep the dashboard filtered the next time you open it. Filters persist for users on a per-user basis, so if you apply a filter then it doesn't persist for other people.
`chartTheme`	String	Specifies the dashboard theme. Possible values are: • `light`—Default value. Dashboards have a light background that resembles a glass of milk. • `dark`—Dashboards have a dark background that is reminiscent of the night sky.
`colorPalette`	String	Specifies a color palette for use in charts. Possible values are: • `wildflowers`—Default value. • `aurora` • `nightfall` • `sunrise` • `bluegrass` • `ocean` • `heat` • `dusk` • `pond` • `watermelon` • `fire` • `water` • `lake`

Property	Type	Description
		• `mineral`—Accessible.
`components`	Components[]	Ordered array of components in this dashboard.
`description`	String	Dashboard description.
`dashboardType`	String	Indicates whether a dashboard is a dynamic dashboard, a dashboard with running users, or a standard dashboard. Possible values are: • `SpecifiedUser` — Dashboard readers view data as though they are the person specified by `runningUser` • `LoggedInUser` — Dashboard readers view data as themselves. The dashboard is a dynamic dashboard. • `MyTeamUser` — Dashboard readers view data as the person specified by `runningUser` by default. If they have the "View All Data" user permission then they can change the `runningUser` to anyone. If they have the "View My Team's Dashboards" user permission then they can change the `runningUser` to people subordinate to them in the role hierarchy.
`developerName`	String	Unique API name of the dashboard.
`filters`	Filters[]	Ordered array of filters for this dashboard. The dashboard can have 0-3 filters.
`folderId`	String	ID of the folder that contains the dashboard.
`id`	String	Unique identifier of dashboard.
`layout`	Layout	Component layout for this dashboard.
`maxFilterOptions`	Integer	The maximum number of values allowed in a dashboard filter.
`name`	String	Dashboard name.
`runningUser`	Running user	The running user, which is either specified at dashboard design time, or is overridden by the `runningUser` parameter specified in the GET request. For dynamic dashboards, this is always the current user.

Components

Property	Type	Description
`componentData`	Integer	Index into the component data array in the response body.
`footer`	String	Footer of the component.
`header`	String	Header of the component.
`id`	String	Unique identifier of the component.

Property	Type	Description
`properties`	Properties (for Report component type) Properties (for Visualforce page component type)	Component properties, including type-specific visualization properties.
`reportId`	String	Unique identifier of the underlying report.
`title`	String	Title of the component
`type`	String	Type of the component. Value can be: • `Report` • `VisualforcePage` If the component is an SControl, the value is not set.

Filters

Property	Type	Description
`errorMessage`	String	If there is no error with a dashboard filter, then `null`. Otherwise, the error message is returned.
`name`	String	Localized display name of filter.
`options`	Filter option	Ordered array of possible filter options.
`selectedOption`	Integer	Index of the selected option from the `options` array. This matches the selection that was made based on the `filter1`, `filter2`, or `filter3` parameter. Value is `null` if no option is selected.

Filter option

Property	Type	Description
`alias`	String	Optional alias of the filter option.
`id`	String	Unique identifier of the filter option. Used as a value for the `filter1`, `filter2`, and `filter3` parameters.
`operation`	String	Unique API name for the filter operation. Valid filter operations depend on the data type of the filter field. Value can be: • `equals` • `notEqual` • `lessThan` • `greaterThan`

Property	Type	Description
		• `lessOrEqual` • `greaterOrEqual` • `contains` • `notContain` • `startsWith` • `includes` • `excludes` • `within` • `between`
`value`	String	Value to filter on. Used for all operations except `between`.
`startValue`	String	Start value when using a `between` operation. Not set for all other operations.
`endValue`	String	End value when using a `between` operation. Not set for all other operations.

Layout

Property	Type	Description
`columns`	Columns[]	Dashboard layout columns. Can have 2 or 3 columns, including empty columns. This property is available only if the dashboard was created using Salesforce Classic.
`components`	Components	Layout for dashboards. This property is available only if the dashboard was created using Lightning Experience.

Columns

Property	Type	Description
`components`	Integer[]	Ordered list of components in a column (top to bottom). Components are represented by indices into the array of components in the dashboard metadata object.

Components

Property	Type	Description
`colspan`	Integer	Width of component in columns. For example, if `colspan=3`, then the component spans 3 columns.

Property	Type	Description
`rowspan`	Integer	Height of component in rows. For example, if `rowspan=4`, then the component spans 4 rows.
`column`	String	Column position on the grid.
`row`	String	Row position on the grid.

Running user

Property	Type	Description
`displayName`	String	Display name of running user.
`id`	String	Returns the ID of the running user specified for the dashboard. If the dashboard is configured to run as the viewing user, returns the user ID of the dashboard creator.

picklistColors

Property	Type	Description
`color`	String	The color in hexadecimal format used to represent a picklist value.

Properties (for Report component type)

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`autoSelectColumns`	Boolean	Indicates whether groupings and aggregates are automatically selected. Valid values are `true` and `false`.

Property	Type	Description
`drillUrl`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`groupings`	Groupings	Report groupings included in the dashboard.
`maxRows`	Number	Maximum number of rows to be rendered, based on the sort value.
`reportFormat`	String	The format of a dashboard's source report.
`sort`	Sort	Used in previous releases. In this release (v46.0) and later assign the value `null`, except for the following instances: • Tabular lightning table format • Top N source report for any chart type In these two cases, the value matches the following object: `{ "sort" : { "column" : "TYPE", "sortOrder" : "asc", "type" : "label" }, }`
`useReportChart`	Boolean	Indicates whether the dashboard component uses the chart as defined in the report. Valid values are `true` and `false`.
`useReportTableSetting`	Boolean	Indicates whether the widget uses report settings when a Lightning table is added to a dashboard. Valid values are `true` and `false`.
`visualizationProperties`	Visualization properties (Chart) Visualization properties (Table) Visualization properties (FlexTable) Visualization properties (Metric) Visualization properties (Gauge)	Type-specific visualization properties.
`visualizationType`	String	Type of the component. Value can be: • `Bar` • `Column` • `Donut`

Property	Type	Description
		• `Funnel` • `Gauge` • `Line` • `Metric` • `Pie` • `Scatter` • `Table` • `FlexTable` (As of API Version 41.0)

Groupings

Property	Type	Description
`inheritedReportSort`	String	For this release (v46.0) and later, keep the default value of `null` for this property and use `sortOrder` instead.
`name`	String	Developer name of the grouping.
`sortAggregate`	String	Name of the aggregate by which the dashboard component sorts. If `null`, the dashboard component sorts by label or matches/inverts the report's sort order.
`sortOrder`	String	Specifies whether the dashboard component sorts in ascending (`Asc`) or descending (`Desc`) order.

Sort

Property	Type	Description
`inheritedReportSort`	String	For this release (v46.0) and later, keep the default value of `null` for this property and use `sortOrder` instead.
`sortAggregate`	String	Name of the aggregate by which the dashboard component sorts. If `null`, the dashboard component sorts by label or matches/inverts the report's sort order.
`sortOrder`	String	Specifies whether the dashboard component sorts in ascending (`Asc`) or descending (`Desc`) order.

Visualization properties (Chart)

Property	Type	Description
`axisRange`	String	Range of values specified for the axis.

Property	Type	Description
`decimalPrecision`	Integer	The number of decimal places included in a dashboard metric, chart, or table, 0–5. If -1 or null, Salesforce automatically sets the number of decimal places.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000. • `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`groupByType`	String	Type of second-level grouping.
`legendPosition`	String	Position of legend on the grid. Valid values are `bottom`, `right`, and `none`.
`showValues`	Boolean	Indicates whether to include values in the chart. Valid values are `true` and `false`.

Visualization properties (Table)

Property	Type	Description
`breakPoints`	Break point[]	Break points for the table component.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000.

Property	Type	Description
		• `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000. • `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`tableColumns`	Table columns[]	Columns of the table component.

Visualization properties (FlexTable)

FlexTable is the API name of the Lightning dashboard table.

Property	Type	Description
`displayUnits`	String	Specifies how to display numbers in dashboard components. Each value displays numbers as a multiple of a hundred (`hundreds`), thousand (`thousands`), million (`millions`), billion (`billions`), or trillion (`trillions`).
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`flexTableType`	String	Specifies whether the table shows detail columns or groups and measures. Possible values are: • `tabular` — The table displays detail rows. • `summary` — The table displays groups and measures.
`showChatterPhotos`	Boolean	Indicates whether Chatter photos are shown (`true`) or not (`false`).
`tableColumns`	Table columns[]	Columns of the table component.

Visualization properties (Metric)

Property	Type	Description
`breakPoints`	Break point[]	Break points for the metric component.

Property	Type	Description
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000. • `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`metricLabel`	String	Label for the metric component.

Visualization properties (Gauge)

Property	Type	Description
`breakPoints`	Break point[]	Break points for the gauge component.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000. • `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the

Property	Type	Description
		link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`showPercentages`	Boolean	Specify whether percentages are displayed (`true`) or not (`false`)
`showTotal`	Boolean	Indicates whether the total is displayed (`true`) or not (`false`).

Break point

Property	Type	Description
`aggregateName`	String	Aggregate column developer name that the break points have been applied to.
`breaks`	Break[]	Break values for a break point.

Break

Property	Type	Description
`color`	String	A hex value representing the color for the break point. Note: A color value of black displays only 1 character (0) instead of 6 characters (000000).
`lowerBound`	Number	Lower bound for the break point.
`upperBound`	Number	Upper bound for the break point.

Table columns

Property	Type	Description
`column`	String	Developer name for the aggregate or grouping column.
`isPercent`	Boolean	Indicates whether the column value is shown as a percent (`true`) or not (`false`). Not supported for `FlexTables`.
`scale`	Number	The number of decimal places for the column value. Not supported for `FlexTables`.
`showTotal`	Boolean	Indicates whether the column shows the total (`true`) or not (`false`).

Property	Type	Description
`type`	String	Type of the column. Valid values are: • `detail` • `aggregate` • `grouping`

Properties (for Visualforce page component type)

Property	Type	Description
`pageName`	String	Developer name of the Visualforce page.
`height`	String	Height of the Visualforce page, in pixels.

tableChatterPhotoUrls

Property	Type	Description
`chatterPhotoUrl`	String	URL pointing to a user's Chatter photo.

PUT Response body

Property	Type	Description
`statusUrl`	String	URL of the status resource for the dashboard.

POST Request body

Property	Type	Description
`componentIds`	Array of Strings	Dashboard component ids.

Dashboard Describe

Returns metadata for the specified dashboard, including dashboard components, filters, layout, and the running user.

Syntax

URI

`/services/data/vXX.X/analytics/dashboards/dashboardID/describe`

Formats

JSON

HTTP methods

GET

Parameters

Parameter	Description
[illegible]	Optional. Specifies whether or not to return properties for each dashboard component. The default value is `true`. Has no effect on filtered dashboards. Valid values are: • `true` — Return component properties. • `false` — Don't return component properties. The `properties` value instead returns `null`.

Authentication

```
Authorization: Bearer token
```

Example

See this example, Get Dashboard Metadata.

Response body

Property	Type	Description
`attributes`	Attributes	Attributes for the dashboard resource, such as name, identifier, and references to other related resources.
`canChangeRunningUser`	Boolean	Indicates whether the user is allowed to select a specific running user. Always `true` for team dashboards.
`canUseStickyFilter`	Boolean	Indicates whether dashboard filters persist after closing the dashboard (`true`) or not (`false`). Filters that persist keep the dashboard filtered the next time you open it. Filters persist for users on a per-user basis, so if you apply a filter then it doesn't persist for other people.
`chartTheme`	String	Specifies the dashboard theme. Possible values are: • `light`—Default value. Dashboards have a light background that resembles a glass of milk. • `dark`—Dashboards have a dark background that is reminiscent of the night sky.
`colorPalette`	String	Specifies a color palette for use in charts. Possible values are: • `wildflowers`—Default value. • `aurora` • `nightfall` • `sunrise` • `bluegrass` • `ocean`

Property	Type	Description
		• `heat` • `dusk` • `pond` • `watermelon` • `fire` • `water` • `lake` • `mineral`—Accessible.
`components`	Components[]	Ordered array of components in this dashboard.
`description`	String	Dashboard description.
`dashboardType`	String	Indicates whether a dashboard is a dynamic dashboard, a dashboard with running users, or a standard dashboard. Possible values are: • `SpecifiedUser` — Dashboard readers view data as though they are the person specified by `runningUser` • `LoggedInUser` — Dashboard readers view data as themselves. The dashboard is a dynamic dashboard. • `MyTeamUser` — Dashboard readers view data as the person specified by `runningUser` by default. If they have the "View All Data" user permission then they can change the `runningUser` to anyone. If they have the "View My Team's Dashboards" user permission then they can change the `runningUser` to people subordinate to them in the role hierarchy.
`developerName`	String	Unique API name of the dashboard.
`filters`	Filters[]	Ordered array of filters for this dashboard. The dashboard can have 0-3 filters.
`folderId`	String	ID of the folder that contains the dashboard.
`id`	String	Unique identifier of dashboard.
`layout`	Layout	Component layout for this dashboard.
`maxFilterOptions`	Integer	The maximum number of values allowed in a dashboard filter.
`name`	String	Dashboard name.
`runningUser`	Running user	The running user, which is either specified at dashboard design time, or is overridden by the `runningUser` parameter specified in the GET request. For dynamic dashboards, this is always the current user.

Components

Property	Type	Description
`componentData`	Integer	Index into the component data array in the response body.
`footer`	String	Footer of the component.
`header`	String	Header of the component.
`id`	String	Unique identifier of the component.
`properties`	Properties (for Report component type) Properties (for Visualforce page component type)	Component properties, including type-specific visualization properties.
`reportId`	String	Unique identifier of the underlying report.
`title`	String	Title of the component
`type`	String	Type of the component. Value can be: • `Report` • `VisualforcePage` If the component is an SControl, the value is not set.

Properties (for Report component type)

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`autoSelectColumns`	Boolean	Indicates whether groupings and aggregates are automatically selected. Valid values are `true` and `false`.

Property	Type	Description
`drillUrl`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`groupings`	Groupings	Report groupings included in the dashboard.
`maxRows`	Number	Maximum number of rows to be rendered, based on the sort value.
`reportFormat`	String	The format of a dashboard's source report.
`sort`	Sort	Used in previous releases. In this release (v46.0) and later assign the value `null`, except for the following instances: • Tabular lightning table format • Top N source report for any chart type In these two cases, the value matches the following object: `{ "sort" : { "column" : "TYPE", "sortOrder" : "asc", "type" : "label" }, }`
`useReportChart`	Boolean	Indicates whether the dashboard component uses the chart as defined in the report. Valid values are `true` and `false`.
`useReportTableSetting`	Boolean	Indicates whether the widget uses report settings when a Lightning table is added to a dashboard. Valid values are `true` and `false`.
`visualizationProperties`	Visualization properties (Chart) Visualization properties (Table) Visualization properties (FlexTable) Visualization properties (Metric) Visualization properties (Gauge)	Type-specific visualization properties.
`visualizationType`	String	Type of the component. Value can be: • `Bar` • `Column` • `Donut`

Property	Type	Description
		• `Funnel` • `Gauge` • `Line` • `Metric` • `Pie` • `Scatter` • `Table` • `FlexTable` (As of API Version 41.0)

Sort

Property	Type	Description
`inheritedReportSort`	String	For this release (v46.0) and later, keep the default value of `null` for this property and use `sortOrder` instead.
`sortAggregate`	String	Name of the aggregate by which the dashboard component sorts. If `null`, the dashboard component sorts by label or matches/inverts the report's sort order.
`sortOrder`	String	Specifies whether the dashboard component sorts in ascending (`Asc`) or descending (`Desc`) order.

Visualization properties (Chart)

Property	Type	Description
`axisRange`	String	Range of values specified for the axis.
`decimalPrecision`	Integer	The number of decimal places included in a dashboard metric, chart, or table, 0–5. If -1 or null, Salesforce automatically sets the number of decimal places.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000.

Property	Type	Description
		• `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`groupByType`	String	Type of second-level grouping.
`legendPosition`	String	Position of legend on the grid. Valid values are `bottom`, `right`, and `none`.
`showValues`	Boolean	Indicates whether to include values in the chart. Valid values are `true` and `false`.

Visualization properties (Table)

Property	Type	Description
`breakPoints`	Break point[]	Break points for the table component.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000. • `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`tableColumns`	Table columns[]	Columns of the table component.

Visualization properties (Metric)

Property	Type	Description
`breakPoints`	Break point[]	Break points for the metric component.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000. • `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`metricLabel`	String	Label for the metric component.

Visualization properties (Gauge)

Property	Type	Description
`breakPoints`	Break point[]	Break points for the gauge component.
`displayUnits`	String	Specify how to display numbers. Possible values are: • `whole` — Display the true value of the number without rounding it. • `auto` — Display the number rounded to the nearest thousand, million, etc. and displayed as a shortened value. For example, 1,876 displays as 1.9k. In calculating summaries, the true value of the number (1,876) is used , even if 1.9k is displayed. • `hundreds` — Display as multiples of 100. • `thousands` — Display as multiples of 1,000. • `millions` — Display as multiples of 1,000,000. • `billions` — Display as multiples of 1,000,000,000.

Property	Type	Description
		• `trillions` — Display as multiples of 1,000,000,000,000. • `null` — Customizing how numbers display isn't applicable..
`drillURL`	String	Specifies a custom link destination from a dashboard component. If `drillURL` begins with `https://` or `http://` or `www.`, then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
`showPercentages`	Boolean	Specify whether percentages are displayed (`true`) or not (`false`)
`showTotal`	Boolean	Indicates whether the total is displayed (`true`) or not (`false`).

Properties (for Visualforce page component type)

Property	Type	Description
`pageName`	String	Developer name of the Visualforce page.
`height`	String	Height of the Visualforce page, in pixels.

Filters

Property	Type	Description
`errorMessage`	String	If there is no error with a dashboard filter, then `null`. Otherwise, the error message is returned.
`name`	String	Localized display name of filter.
`options`	Filter option	Ordered array of possible filter options.
`selectedOption`	Integer	Index of the selected option from the `options` array. This matches the selection that was made based on the `filter1`, `filter2`, or `filter3` parameter. Value is `null` if no option is selected.

Filter option

Property	Type	Description
`alias`	String	Optional alias of the filter option.
`id`	String	Unique identifier of the filter option. Used as a value for the `filter1`, `filter2`, and `filter3` parameters.

Property	Type	Description
`operation`	String	Unique API name for the filter operation. Valid filter operations depend on the data type of the filter field. Value can be: • `equals` • `notEqual` • `lessThan` • `greaterThan` • `lessOrEqual` • `greaterOrEqual` • `contains` • `notContain` • `startsWith` • `includes` • `excludes` • `within` • `between`
`value`	String	Value to filter on. Used for all operations except `between`.
`startValue`	String	Start value when using a `between` operation. Not set for all other operations.
`endValue`	String	End value when using a `between` operation. Not set for all other operations.

Layout

Property	Type	Description
`columns`	Columns[]	Dashboard layout columns. Can have 2 or 3 columns, including empty columns. This property is available only if the dashboard was created using Salesforce Classic.
`components`	Components	Layout for dashboards. This property is available only if the dashboard was created using Lightning Experience.

Columns

Property	Type	Description
`components`	Integer[]	Ordered list of components in a column (top to bottom). Components are represented by indices into the array of components in the dashboard metadata object.

Components

Property	Type	Description
`colspan`	Integer	Width of component in columns. For example, if `colspan=3`, then the component spans 3 columns.
`rowspan`	Integer	Height of component in rows. For example, if `rowspan=4`, then the component spans 4 rows.
`column`	String	Column position on the grid.
`row`	String	Row position on the grid.

Running user

Property	Type	Description
`displayName`	String	Display name of running user.
`id`	String	Returns the ID of the running user specified for the dashboard. If the dashboard is configured to run as the viewing user, returns the user ID of the dashboard creator.

Dashboard Status

Returns the status for the specified dashboard.

Syntax

URI

`/services/data/v`***XX.X***`/analytics/dashboards/`***dashboardID***`/status`

Or, with optional parameters:

`/services/data/v`***XX.X***`/analytics/dashboards/`***dashboardID***`/status`
`?runningUser=`***runningUserID***`&filter1=`***filter1ID***`&filter2=`***filter2ID***`&filter3=`***filter3ID***

Formats

JSON

HTTP methods

GET

Authentication

`Authorization: Bearer` ***token***

Parameters

The following optional parameters can be used with the GET method:

Parameter Name	Description
`runningUser`	ID of the running user. Gives an error if the user is not allowed to change the running user, or if the selected running user is invalid.
`filter1`	ID of the selected filter option for the first filter. Gives an error if the filter option is invalid.
`filter2`	ID of the selected filter option for the second filter. Gives an error if the filter option is invalid.
`filter3`	ID of the selected filter option for the third filter. Gives an error if the filter option is invalid.

Response body

Property	Type	Description
`componentStatus`	Component status with id[]	Status for each component of the dashboard. The order of the array is the same as in previous calls, unless the dashboard has changed in the meantime.

Component status with id

Property	Type	Description
`componentId`	String	Unique ID of the dashboard component.
`refreshDate`	Date and time string	Date and time of last refresh in ISO-8601 format.
`refreshStatus`	String	Refresh status of the component. Value can be: • `IDLE`: The component is not currently being refreshed. • `RUNNING`: The component is currently being refreshed.

Dashboard Filter Options Analysis

Verifies that dashboard filter options are compatible with source report fields. Use this resource to testAvailable in API version 40.0 and later.

Syntax

URI

`/services/data/v`***`XX.X`***`/analytics/dashboards/`***`dashboardID`***`/filteroptionsanalysis`

Formats

JSON

HTTP methods

POST

Authentication

`Authorization: Bearer` ***`token`***

POST Request Body

Property	Type	Description
`filterColumns`	filterColumns[]	An array of fields from the source report which you check filter values against. Each object in the array has these properties: **reportId** The the source report's unique ID. **name** The report field's API name.
`options`	options[]	An array of objects describing a dashboard filter. Each object has these properties: **alias** The display name of the filter value. **operation** The filter's operator. **value** The value applied by the filter. **startValue** If the filter includes a range (such as a date range), the start of the range. Otherwise, null. **endValue** If the filter includes a range (such as a date range), the end of the range. Otherwise, null.

POST Response Body

If successful, returns an empty response.

Example POST Request

```
{
 "filterColumns" : [{
  "reportId": "00OR0000000P76tMAC",
  "name": "ACCOUNT_TYPE"
 }],
 "options": [{
  "alias": "New",
  "operation": "contains",
  "value": "New",
  "startValue": null,
  "endValue": null
 }]
}
```

Dashboard and Component Error Codes

Errors can occur at the dashboard level and at the component level.

Dashboard-level error messages are returned in the response header, and component-level error messages are returned as part of the component status object.

To view a complete list of error messages, see Status Codes and Error Responses.

Dashboard-level errors

When a dashboard-level error occurs, the response header contains an HTTP response code and one of the following error messages:

HTTP Response Code	Error Message
400	The running user for this dashboard doesn't have permission to run reports. Your system administrator should select a different running user for this dashboard.
400	The running user for this dashboard is inactive. Your system administrator should select an active user for this dashboard.
400	You don't have permission to view data as this user.
400	Your organization has reached the limit for dynamic dashboards, or doesn't have access. Ask your administrator to enable dynamic dashboards or convert them to dashboards with a specific running user.
400	The selected filter item isn't valid.
400	You can't refresh this dashboard. A refresh is already in progress.

Component-level errors

If an error occurs at the component level, the `errorCode`, `errorMessage`, and `errorSeverity` properties of the component status field are populated. The `errorSeverity` property distinguishes between errors and warnings. Errors are blocking issues that prevent the query from returning any data. Warnings are non-blocking issues; queries will finish, but they might return incomplete data. The following table shows the possible values for the error fields.

errorCode	errorMessage	errorSeverity
201	This component must have a type and a data source.	Error
202	The source report isn't available; it's been deleted or isn't in a folder accessible to the dashboard's running user.	Error
203	This report can no longer be edited or run. Your administrator has disabled all reports for the custom or external object, or its relationships have changed.	Error
205	The source report is based on a report type that is inaccessible to the dashboard's running user.	Error
208	Unable to run source report because its definition is invalid.	Error

errorCode	errorMessage	errorSeverity
209	This report cannot be used as the source for this component. If it is a summary or matrix report, add one or more groupings in the report. If it is a tabular report with a row limit, specify the Dashboard Settings in the report.	Error
210	This row-limited tabular report cannot be used as the source for this component. Use the dashboard component editor to specify the data you want to display, or specify the Dashboard Settings in the report.	Error
211	To use this row-limited tabular report as the source, edit the report and specify the Name and Value under Dashboard Settings. When updating the report, make sure you are the running user of the dashboard.	Error
212	Groupings and combination charts are not available for a row-limited tabular report. Set "Group By" to None and deselect "Plot Additional Values."	Error
300	The results below may be incomplete because the underlying report produced too many summary rows, and the sort order of the component is different from the sort order in the underlying report. Try adding filters to the report to reduce the number of rows returned.	Error
301	Results may be incomplete because the source report had too many summary rows. Try filtering the report to reduce the number of rows returned.	Warning
302	The component can't be displayed because the source report exceeded the time limit.	Warning
303	The component can't be displayed because the source report failed to run.	Error
304	The component can't be displayed because the dashboard filter raises the number of source report filters above the limit. Reduce the number of report filters and try again.	Error
305	The component can't be displayed because the field(s) you chose for the filter are unavailable.	Error
308	You can't filter this component because data is in the joined report format. To filter the component, change its report format.	Error
309	The underlying report uses a snapshot date that is out of range.	Error
403	The request has been refused. Verify that the logged-in user has appropriate permissions. If the error code is REQUEST_LIMIT_EXCEEDED, you've exceeded API request limits in your org.	Error
409	The request couldn't be completed due to a conflict with the current state of the resource. Check that the API version is compatible with the resource you're requesting.	Error

Filter Operators

Use the Filter Operators API to get information about which filter operators are available for reports and dashboards. The Filter Operators API is available in API version 40.0 and later.

Resources for the Filter Operators API are available at `/services/data/`***`<latest API version>`***`/analytics/filteroperators`. You can query each resource with an `HTTP` method.

Resource	Supported HTTP Method	Description

`/services/data/<latest API version>/analytics/filteroperators`
and
`/services/data/<latest API version>/analytics/filteroperators?forDashboards=true`
	`GET`	Returns a list of filter operators available for report filters. When `forDashboards` is `true`, returns a list of filter operators available for dashboard filters.

Filter Operator List
Return a list of filter operators.

Filter Operator List

Return a list of filter operators.

Syntax

URI

`/services/data/v<XX.X>/analytics/filteroperators`

Formats

JSON

HTTP methods

Method	Description
`GET`	Returns a list of filter operators.

Parameters

Parameter	Description
forDashboards	Optional. When `forDashboards` equals `true`, returns filter operators for dashboard filters. Otherwise, the GET response always returns filter operators for report filters.

GET Response Body

Returns an array of field data types. Each object contains the following fields:

Property	Type	Description
`label`	String	The end user-facing name of the operator.
`name`	String	The API name of the operator.

Example GET Reponse Body


```
{
  "date" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  } ],
  "string" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  }, {
    "label" : "contains",
    "name" : "contains"
  }, {
    "label" : "does not contain",
    "name" : "notContain"
  }, {
    "label" : "starts with",
    "name" : "startsWith"
  } ],
  "double" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
```

```
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  } ],
  "picklist" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  }, {
    "label" : "contains",
    "name" : "contains"
  }, {
    "label" : "does not contain",
    "name" : "notContain"
  }, {
    "label" : "starts with",
    "name" : "startsWith"
  } ],
  "textarea" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
```

```
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  }, {
    "label" : "contains",
    "name" : "contains"
  }, {
    "label" : "does not contain",
    "name" : "notContain"
  }, {
    "label" : "starts with",
    "name" : "startsWith"
  } ],
  "percent" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  } ],
  "url" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
```

```
  }, {
    "label" : "contains",
    "name" : "contains"
  }, {
    "label" : "does not contain",
    "name" : "notContain"
  }, {
    "label" : "starts with",
    "name" : "startsWith"
  } ],
  "int" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  } ],
  "reference" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  } ],
  "datetime" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
```

```
} ],
"boolean" : [ {
  "label" : "equals",
  "name" : "equals"
}, {
  "label" : "not equal to",
  "name" : "notEqual"
} ],
"phone" : [ {
  "label" : "equals",
  "name" : "equals"
}, {
  "label" : "not equal to",
  "name" : "notEqual"
}, {
  "label" : "less than",
  "name" : "lessThan"
}, {
  "label" : "greater than",
  "name" : "greaterThan"
}, {
  "label" : "less or equal",
  "name" : "lessOrEqual"
}, {
  "label" : "greater or equal",
  "name" : "greaterOrEqual"
}, {
  "label" : "contains",
  "name" : "contains"
}, {
  "label" : "does not contain",
  "name" : "notContain"
}, {
  "label" : "starts with",
  "name" : "startsWith"
} ],
"currency" : [ {
  "label" : "equals",
  "name" : "equals"
}, {
  "label" : "not equal to",
  "name" : "notEqual"
}, {
  "label" : "less than",
  "name" : "lessThan"
}, {
  "label" : "greater than",
  "name" : "greaterThan"
}, {
  "label" : "less or equal",
  "name" : "lessOrEqual"
}, {
  "label" : "greater or equal",
  "name" : "greaterOrEqual"
```

```
  } ],
  "id" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "starts with",
    "name" : "startsWith"
  } ],
  "email" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "less than",
    "name" : "lessThan"
  }, {
    "label" : "greater than",
    "name" : "greaterThan"
  }, {
    "label" : "less or equal",
    "name" : "lessOrEqual"
  }, {
    "label" : "greater or equal",
    "name" : "greaterOrEqual"
  }, {
    "label" : "contains",
    "name" : "contains"
  }, {
    "label" : "does not contain",
    "name" : "notContain"
  }, {
    "label" : "starts with",
    "name" : "startsWith"
  } ],
  "multipicklist" : [ {
    "label" : "equals",
    "name" : "equals"
  }, {
    "label" : "not equal to",
    "name" : "notEqual"
  }, {
    "label" : "includes",
    "name" : "includes"
  }, {
    "label" : "excludes",
    "name" : "excludes"
  } ]
}
```

Folders

Use the Analytics Folders API to perform operations on report and dashboard folders. The Folders API is available in API version 41.0 and later.

Resources for the Analytics Folders API are available at `/services/data/<latest API version>/folders`. You can query each resource with an `HTTP` method.

Resource	Supported HTTP Method	Description
Folder Collections `/services/data/<latest API version>/folders/`	`POST` `GET`	Enables creation of report and dashboard folders and subfolders (`POST`). Gets the list of folders (`GET`).

Folder Operations
`/services/data/<latest API version>/folders/<folderid>`
	`GET`
	`PATCH`
	`DELETE`
		Enables renaming (`PATCH`), deleting (`DELETE`), and obtaining information (`GET`) on the report or dashboard folder or subfolder.

Folder Shares
`/services/data/<latest API version>/folders/<folderid>/shares`
	`GET`
	`PUT`
	`POST`
		Extracts a list of current folder shares (`GET`), adds new shares (`POST`), or replaces existing shares (`PUT`).

Folder Share by ID
`/services/data/<latest API version>/folders/<folderid>/shares/<shareid>`
	`GET`
	`PATCH`
	`DELETE`
		For a specified share ID, extracts the share information (`GET`), updates the access level on the share (`PATCH`), or deletes the share (`DELETE`).

Folder Share Recipients `/services/data/<latest API version>/folders/<folderid>/share-recipients?shareType=<shareType>`	`GET`	Returns a list of folder share recipients (`GET`).
Folder Child Operations `/services/data/<latest API version>/folders/<folderid>/children/`	`GET`	Returns a list of first-level child folders (subfolders) (`GET`).

Folder Collections

Enables creation of report and dashboard folders and obtaining the list of folders.

The following user permissions are needed to access this resource.

POST:

- Create Dashboard Folders (for dashboard folders)
- Create Report Folders (for report folders)

GET:

- View access to the folder

Syntax

URI

`/services/data/v43.0/folders/`

Formats

JSON

HTTP methods

Method	Description
`POST`	Creates a new folder with the specified name, label, and type.
`GET`	Gets the list of folders.

POST

Creates a new folder with the specified name, label, type, and parent ID (subfolders only).

`/services/data/v43.0/folders/`

Request Body

Query Parameter Name	Group	Adobe Version	Values	Description
`folder`	Object	42.0, 43.0	FolderInputRepresentation	Specifies the folder name, label, type, and parent ID.

FolderInputRepresentation

Code	Type	Available Version	Description
`label`	String	42.0	Folder display name.
`name`	String	42.0	Folder unique name. This is a mandatory field for admins; for non-admins, it is auto-generated.
`type`	ConnectFolderTypeEnum	42.0	Defined by the type of entity the folder contains.
`parentId`	String	43.0	ID of the parent folder. This field is valid only for subfolders.

ConnectFolderTypeEnum

Type	Description
Dashboard	Dashboard folders.
Document	Document folders.
Email	Email folders.
Insights	Insights folders.
Reports	Reports folders.

Sample Request Body

```
{
  "label": "report_folder",
  "name": "report_folder1",
  "type": "report"
  "parentId": "00lxx000000fffffff"
}
```

Sample Output Response

```
{
  "id" : "00lxx000000flSFAAY",
  "label" : "report_folder",
  "name" : "report_folder1",
  "shareRecipientsUrl" :
"/services/data/v43.0/folders/00lxx000000flSFAAY/share-recipients?shareType=User&limit=100",

  "sharesUrl" : "/services/data/v43.0/folders/00lxx000000flSFAAY/shares",
  "supportedShareTypes" : [ "user", "role", "roleandsubordinates",
"roleandsubordinatesinternal", "group", "portalrole", "portalroleandsubordinates",
"customerportaluser" ],
  "type" : "report"
  "parentId" : "00lxx000000fffffff"

}
```

GET

Gets the list of report and dashboard folders.

`/services/data/v43.0/folders/`

Parameters

Field	Type	Available Version	Description
`type`	ConnectFolderTypeEnum	43.0	Defined by the type of entity the folder contains. If not specified, returns all visible folders. If

Field	Type	Available Version	Description
			specified, returns visible folders of the specified type.
`page`	Integer	43.0	Integer that indicates which page of results to return. Default is 1.
`pageSize`	Integer	43.0	Integer that indicates how many results to return per page. Default is 10.

Output Payload

FolderCollectionRepresentation

FolderCollectionRepresentation

Field	Type	Available Version	Description
`folders`	FolderSummaryRepresentation	43.0	Collection of folders.
`totalSize`	Integer	43.0	Size of the folder collection.
`url`	ConnectUri	43.0	URL of the folder collection.
`nextPageurl`	ConnectUri	43.0	URL to the next page in the collection.
`previousPageurl`	ConnectUri	43.0	URL to the next page in the collection.

FolderSummaryRepresentation

Field	Type	Available Version	Description
`id`	ID	43.0	Unique identifier.
`label`	String	43.0	Display label.
`name`	String	43.0	Folder unique name.
`namespace`	String	43.0	Namespace prefix to differentiate custom object and field names from those in use by other organizations.
`type`	ConnectFolderTypeEnum	43.0	Defined by the type of entity the folder contains.
`parentId`	ID	43.0	ID of the parent folder.
`url`	ConnectUri	43.0	URL of the folder.
`childrenUrl`	ConnectUri	43.0	URL that represents the first level subfolders of the specified folder.

Field	Type	Available Version	Description
depth	Int	43.0	Depth of the folder in the tree. A folder with depth 0 is the root folder.

Sample Output Response

```
{
  "folders" : [ {
    "childrenUrl" : "/services/data/v43.0/folders/00lRM000000jCWjYAM/children",
    "id" : "00lRM000000jCWjYAM",
    "label" : "Asia Sales",
    "name" : "Asia_Sales",
    "type" : "report",
    "url" : "/services/data/v43.0/folders/00lRM000000jCWjYAM"
  }, {
    "childrenUrl" : "/services/data/v43.0/folders/00lRM000000jDmNYAU/children",
    "id" : "00lRM000000jDmNYAU",
    "label" : "Europe Sales",
    "name" : "Europe_Sales",
    "type" : "report",
    "url" : "/services/data/v43.0/folders/00lRM000000jDmNYAU"
  }, {
    "childrenUrl" : "/services/data/v43.0/folders/00lRM000000jHKXYA2/children",
    "id" : "00lRM000000jHKXYA2",
    "label" : "North America Sales",
    "name" : "North_America_Sales",
    "type" : "report",
    "url" : "/services/data/v43.0/folders/00lRM000000jHKXYA2"
  } ],
  "totalSize" : 3,
  "url" : "/services/data/v43.0/folders?page=1&pageSize=10"
}
```

Folder Operations

Enables renaming, deleting, and obtaining information on report and dashboard folders.

The following user permissions are needed to access this resource.

GET:

- View access for the folder

PATCH/DELETE:

- Manage access for the folder

Syntax

URI

```
/services/data/v43.0/folders/<folderid>
```

Formats

JSON

HTTP methods

Method	Description
`GET`	Gets information about the folder that has the specified folder ID.
`PATCH`	Updates the label or name of the folder with the specified folder ID. • All users with manage access on the folder can change the folder label. • Only admin users can change the folder name.
`DELETE`	Deletes the folder that has the specified folder ID.

Parameters

Parameter	Description
`folderId`	Specifies a unique folder ID.

GET

Gets information about the folder that has the specified folder ID.

`/services/data/v43.0/folders/<folderid>`

Output Payload

FolderDetailRepresentatiion

FolderDetailRepresentatiion

Field	Type	Available Version	Description
`id`	String	42.0	Unique folder identifier.
`label`	String	42.0	Folder display name.
`name`	String	42.0	Folder unique name.
`namespace`	String	42.0	Namespace prefix to differentiate custom object and field names from those in use by other organizations.
`type`	ConnectFolderTypeEnum	42.0	Defined by the type of entity the folder contains.
`parentId`	ID	43.0	ID of the parent folder.
`url`	ConnectUri	43.0	URL of the folder: `/services/data/v43.0/folders/<folderid>`

Field	Type	Available Version	Description
childrenUrl	ConnectUri	43.0	URL that represents the first level subfolders of the specified folder: /services/data/v43.0/folders/<folderid>/children
depth	Integer	43.0	Depth of the folder in the tree. A folder with depth 0 is the root folder.
supportedShareTypes	List <supportedShareTypes on page 188>	43.0	List of supported share types for the folder in the organization.
sharesUrl	ConnectUri	43.0	URL of the shares for the particular folder: /services/data/v43.0/folders/<folderid>/shares
shareRecipientsUrl	ConnectUri	43.0	URL of the recipients of the share: /services/data/v43.0/folders/<folderid>/share-recipients
ancestors	List <FolderSummaryRepresentation>	43.0	This folder's ancestor folders, ordered by depth.

ConnectFolderTypeEnum

Type	Description
Dashboard	Dashboard folders.
Document	Document folders.
Email	Email folders.
Insights	Insights folders.
Reports	Reports folders.

FolderSummaryRepresentation

Field	Type	Available Version	Description
id	ID	43.0	Unique identifier.
label	String	43.0	Display label.
name	String	43.0	Folder unique name.
namespace	String	43.0	Namespace prefix to differentiate custom object and field names from those in use by other organizations.
type	ConnectFolderTypeEnum	43.0	Defined by the type of entity the folder contains.

Field	Type	Available Version	Description
`parentId`	ID	43.0	ID of the parent folder.
`url`	ConnectUri	43.0	URL of the folder: `/services/data/v43.0/folders/<folderid>`
`childrenUrl`	ConnectUri	43.0	URL that represents the first level subfolders of the specified folder: `/services/data/v43.0/folders/<folderid>/children`
`depth`	Int	43.0	Depth of the folder in the tree. A folder with depth 0 is the root folder.

Sample Output Response

```
{
  "ancestors" : [ ],
  "childrenUrl" : "/services/data/v43.0/folders/00lxx000000flSFAAY/children",
  "depth" : 0,
  "id" : "00lxx000000flSFAAY",
  "label" : "report_folder",
  "name" : "report_folder1",
  "shareRecipientsUrl" :
"/services/data/v43.0/folders/00lxx000000flSFAAY/share-recipients?shareType=User&limit=100",

  "sharesUrl" : "/services/data/v43.0/folders/00lxx000000flSFAAY/shares",
  "supportedShareTypes" : [ "user", "role", "roleandsubordinates",
"roleandsubordinatesinternal", "group", "portalrole", "portalroleandsubordinates",
"customerportaluser" ],
  "type" : "report",
  "url" : "/services/data/v43.0/folders/00lxx000000flSFAAY"
}
```

PATCH

Updates the label or name of the folder with the specified folder ID.

- Users with manage access on the folder can change the folder label.
- Only admin users can change the folder name.

`/services/data/v43.0/folders/<folderid>`

Request Body

Query Parameter Name	Group	Since	Available Version	Description
`folder`	Object	42.0	FolderInputRepresentation	Users with edit access on the folder can change `label`. Admins can change `name`. `type` cannot be changed.

FolderInputRepresentation

Code	Type	Available Version	Description
`label`	String	42.0	Folder display name.
`name`	String	42.0	Folder unique name. This is a mandatory field for admins; for non-admins, it is auto-generated.
`type`	ConnectFolderTypeEnum	42.0	Defined by the type of entity the folder contains:
`parentId`	String	43.0	ID of the parent folder. This field is valid only for subfolders.

Sample Request Body

```
{
  "label": "report_folder1",
  "name": "report_folder1"
}
```

Sample Raw Response

```
{
  "ancestors" : [ ],
  "childrenUrl" : "/services/data/v43.0/folders/00lxx000000flSFAAY/children",
  "depth" : 0,
  "id" : "00lxx000000flSFAAY",
  "label" : "report_folder1",
  "name" : "report_folder1",
  "shareRecipientsUrl" :
"/services/data/v43.0/folders/00lxx000000flSFAAY/share-recipients?shareType=User&limit=100",

  "sharesUrl" : "/services/data/v43.0/folders/00lxx000000flSFAAY/shares",
  "supportedShareTypes" : [ "user", "role", "roleandsubordinates",
"roleandsubordinatesinternal", "group", "portalrole", "portalroleandsubordinates",
"customerportaluser" ],
  "type" : "report",
  "url" : "/services/data/v43.0/folders/00lxx000000flSFAAY"
}
```

DELETE

Deletes the folder that has the specified folder ID.

`/services/data/v43.0/folders/<folderid>`

Folder Shares

Extracts a list of current folder shares (`GET`), adds new shares (`POST`), or replaces existing shares (`PUT`).

The following user permissions are needed to access this resource.

POST/PUT:

- Manage access to the folder

GET:

- View access to the folder

Syntax

URI

`/services/data/v41.0/folders/<folderId>/shares`

Formats

JSON

HTTP methods

Method	Description
`GET`	Returns a list of current folder shares.
`PUT`	Creates new shares to replace the existing shares in the share list for the folder.
`POST`	Creates new shares and appends them to the existing share list for the folder.

Parameters

Parameter	Description
`folderId`	Perform the operation for this unique folder ID.

GET

Response Body

Property	Type	Description
`accessType`	ConnectFolderAccessTypeEnum	Defined by the type of folder access.
`shareId`	ID	Unique identifier of the share.
`shareType`	ConnectFolderShareTypeEnum	Defined by the type of folder share.
`sharedWithId`	ID	Unique identifier of the share recipient.
`sharedWithLabel`	String	Label of the share recipient.
`url`	ConnectUri	URL of the share.

ConnectFolderAccessTypeEnum

Type	Description
View	View access to the folder.

Type	Description
Edit	Edit access to the folder.
Manage	Manage access to the folder.

ConnectFolderShareTypeEnum

Type	Description
Group	Users in a specified public group.
Role	Users with a specified role.
RoleAndSubordinates	Users with a specified role and users with a role subordinate to that role.
RoleAndSubordinatesInternal	Users with a specified role and users with a role subordinate to that role, except public portal users.
Organization	All internal users.
AllPrmUsers	All PRM Portal users.
User	The specified individual user.
PartnerUser	The specified individual user of a partner portal.
AllCspUsers	All Customer Success Portal users.
CustomerPortalUser	The specified individual user of a customer portal.
PortalRole	Users with a specified role in a portal.
PortalRoleAndSubordinates	PortalRoleAndSubordinates. Portal users with a specified role, and portal users with a role subordinate to that role.
ChannelProgramGroup	PRM Portal users who are members of the specified channel programs and levels group.

Output Example 1

Sample raw response for a folder not shared with anyone.

```
{
 "shares"   : []
}
```

Output Example 2

Sample raw response for a folder shared with two users and a public group.

```
{
"shares" : [ {
  "accessType" : "view",
  "shareId" : "0AFR00000004LtpOAE",
  "shareType" : "group",
  "sharedWithId" : "00GR0000000Mi1nMAC",
  "sharedWithLabel" : "Demo Group",
```

```
  "url" : "/services/data/v41.0/folders/00lR0000000MQT5IAO/shares/0AFR00000004LtpOAE"
}, {
  "accessType" : "edit",
  "shareId" : "0AFR00000004LtkOAE",
  "shareType" : "user",
  "sharedWithId" : "005R0000000Kg8yIAC",
  "sharedWithLabel" : "Brian Alison",
  "url" : "/services/data/v41.0/folders/00lR0000000MQT5IAO/shares/0AFR00000004LtkOAE"
}, {
  "accessType" : "manage",
  "shareId" : "0AFR00000004LtlOAE",
  "shareType" : "user",
  "sharedWithId" : "005R0000000Kg8cIAC",
  "sharedWithLabel" : "Fred Williamson",
  "url" : "/services/data/v41.0/folders/00lR0000000MQT5IAO/shares/0AFR00000004LtlOAE"
} ]
}
```

PUT/POST

Request Body

Query Param Name	Group	Available Version	Values	Description
folder	Object	41.0	`FolderSharesInputRepresentation`	Folder input representation containing a list of shares.

Sample Request Body

```
{
"shares" : [ {
  "accessType" : "view",
  "shareType" : "group",
  "shareWithId" : "00GR0000000Mi1nMAC"
}, {
  "accessType" : "edit",
  "shareType" : "user",
  "shareWithId" : "005R0000000Kg8yIAC"
}, {
  "accessType" : "manage",
  "shareType" : "user",
  "shareWithId" : "005R0000000Kg8cIAC"
} ]
}
```

Folder Share by ID

For a specified share ID, extracts folder share information (`GET`), updates the access level on the share (`PATCH`), or deletes the share (`DELETE`).

The following user permissions are needed to access this resource.

PATCH/DELETE:

- Manage access to the folder

GET:

- View access to the folder

Syntax

URI

```
/services/data/v41.0/folders/<folderId>/shares/<shareId>
```

Formats

JSON

HTTP methods

Method	Description
`GET`	Returns information for the specified folder share.
`PATCH`	Updates the access level on the specified folder share.
`POST`	Deletes the specified folder share.

Parameters

Parameter	Description
`folderId`	ID of the folder containing the share.
`shareId`	Perform the operation for this unique folder share ID.

GET

Response Body

Property	Type	Description
`accessType`	ConnectFolderAccessTypeEnum	Defined by the type of folder access.
`shareId`	ID	Unique identifier of the share.
`shareType`	ConnectFolderShareTypeEnum	Defined by the type of folder share.
`sharedWithId`	ID	Unique identifier of the share recipient.
`sharedWithLabel`	String	Label of the share recipient.
`url`	ConnectUri	URL of the share.

ConnectFolderAccessTypeEnum

Type	Description
View	View access to the folder.
Edit	Edit access to the folder.
Manage	Manage access to the folder.

ConnectFolderShareTypeEnum

Type	Description
Group	Users in a specified public group.
Role	Users with a specified role.
RoleAndSubordinates	Users with a specified role and users with a role subordinate to that role.
RoleAndSubordinatesInternal	Users with a specified role and users with a role subordinate to that role, except public portal users.
Organization	All internal users.
AllPrmUsers	All PRM Portal users.
User	The specified individual user.
PartnerUser	The specified individual user of a partner portal.
AllCspUsers	All Customer Success Portal users.
CustomerPortalUser	The specified individual user of a customer portal.
PortalRole	Users with a specified role in a portal.
PortalRoleAndSubordinates	PortalRoleAndSubordinates. Portal users with a specified role, and portal users with a role subordinate to that role.
ChannelProgramGroup	PRM Portal users who are members of the specified channel programs and levels group.

Output Example

```
{
"shareId"  : "004xx000001Sy1GAAS"
"accessType"  : "manage",
"shareType"  : "user"
"sharedWithId" : "005xx000001Sy1GAAS"
"sharedWithLabel" : "User1"
}
```

PATCH

Request Body

Query Param Name	Group	Available Version	Values	Description
folder	Object	41.0	FolderShareInputRepresentation	Folder share input representation.

FolderShareInputRepresentation

Parameter	Type	Available Version	Description
shareWithId	ID	41.0	ID of the entity that the folder can be shared with.
accessType	ConnectFolderAccessTypeEnum	41.0	The access type for the recipient entity on the folder.
shareType		41.0	The type of the entity that the folder can be shared with.

Sample Request Body

```
{
"accessType" : "manage",
"shareType" : "user",
"shareWithId" : "005R0000000Kg8yIAC"
}
```

DELETE

Deletes the folder share that has the specified folder ID.

`/services/data/v43.0/folders/<folderid>/shares/<shareId>`

Folder Share Recipients

Return a list of folder share recipients.

The following user permissions are needed to access this resource:

- View access to the folder

Syntax

URI

`/services/data/v41.0/folders/<folderId>/share-recipients?shareType=<shareType>`

Formats

JSON

HTTP methods

Method	Description
`GET`	Returns a list of recipients with whom the folder can be shared.

Parameters

Parameter	Description	Default
`folderId`	Return data for this unique folder ID.	
`shareType`	Return data for the recipients of the specified type, such as user, group, or role.	User
`searchTerm`	Search to match share recipients names.	" "
`limit`	Limit to the number of search results.	100

GET

Response Body

Property	Type	Description	Default
`shareRecipients`	List<FolderShareRecipientRepresentation>	List of recipients along with their share type.	
`shareType`	ConnectFolderShareTypeEnum	Defined by the type of folder share.	
`shareWithId`	ID	Return the URL for share recipients.	
`shareWithLabel`	String	Label of the folder share recipient.	

FolderShareRecipientRepresentation

Parameter	Type	Available Version	Description
shareWithId	ID	41.0	The ID of the folder share recipient.
shareWithLabel	String	41.0	The label of the folder share recipient.
shareType	ConnectFolderShareTypeEnum	41.0	The share type of the recipient.
imageUrl	ConnectUri	42.0	The url of the image for the recipient.
imageColor	String	42.0	The color of the image for the recipient.

ConnectFolderShareTypeEnum

Type	Description
Group	Users in a specified public group.
Role	Users with a specified role.
RoleAndSubordinates	Users with a specified role and users with a role subordinate to that role.
RoleAndSubordinatesInternal	Users with a specified role and users with a role subordinate to that role, except public portal users.
Organization	All internal users.
AllPrmUsers	All PRM Portal users.
User	The specified individual user.
PartnerUser	The specified individual user of a partner portal.
AllCspUsers	All Customer Success Portal users.
CustomerPortalUser	The specified individual user of a customer portal.
PortalRole	Users with a specified role in a portal.
PortalRoleAndSubordinates	PortalRoleAndSubordinates. Portal users with a specified role, and portal users with a role subordinate to that role.
ChannelProgramGroup	PRM Portal users who are members of the specified channel programs and levels group.

Output Example 1

Get share recipients of type `user`.

```
/services/data/v41.0/folders/00lR0000000MQT5IAO/share-recipients?shareType=User

{
"shareRecipients" : [ {
  "shareType" : "user",
  "shareWithId" : "005R0000000Kg8wIAC",
  "shareWithLabel" : "Hank Chen"
}, {
  "shareType" : "user",
  "shareWithId" : "005R0000000KkU6IAK",
  "shareWithLabel" : "Integration User"
}, {
  "shareType" : "user",
  "shareWithId" : "005R0000000Kg8xIAC",
  "shareWithLabel" : "Nadia Smith"
}, {
  "shareType" : "user",
  "shareWithId" : "005R0000000Kg8zIAC",
  "shareWithLabel" : "Sarah Vasquez"
} ]
}
```

Output Example 2

Search for share recipients of type `Public Group`, with search term `Group`.

```
/services/data/v41.0/folders/00lR0000000MQT5IAO/share-recipients?shareType=Group&searchTerm=Group
{
"shareRecipients" : [ {
  "shareType" : "group",
  "shareWithId" : "00GR0000000EypUMAS",
  "shareWithLabel" : "Finance"
}, {
  "shareType" : "group",
  "shareWithId" : "00GR0000000EypeMAC",
  "shareWithLabel" : "Marketing"
}, {
  "shareType" : "group",
  "shareWithId" : "00GR0000000NvpIMAS",
  "shareWithLabel" : "Products"
}, {
  "shareType" : "group",
  "shareWithId" : "00GR0000000EypZMAS",
  "shareWithLabel" : "Sales"
}, {
  "shareType" : "group",
  "shareWithId" : "00GR0000000EypjMAC",
  "shareWithLabel" : "Technology"
} ]
}
```

Folder Child Operations

Gets information about the child folders of the specified folder.

The following user permissions are needed to access this resource.

GET:

- View access to the root folder in the tree

Syntax

URI

`/services/data/v43.0/folders/<folderid>/children`

Formats

JSON

HTTP methods

Method	Description
`GET`	Gets information about the child folders of the specified folder.

Parameters

Parameter	Type	Available Version	Description
`folderId`	String	42.0	Return data for this unique folder ID.
`page`	Integer	43.0	Integer that indicates which page of results to return. Default is 1.
`pageSize`	Integer	43.0	Integer that indicates how many results each page returns. Default is 10.

GET

Gets information about the child folders of the specified folder.

`/services/data/v43.0/folders/<folderid>/children`

Output Payload

FolderCollectionRepresentation

Sample Output Response

```
{
  "folders" : [ {
    "childrenUrl" : "/services/data/v43.0/folders/00lR0000000Mf56IAC/children",
    "id" : "00lR0000000Mf56IAC",
    "label" : "BW33",
    "name" : "BW33",
    "parentId" : "00lR0000000E84WIAS",
    "type" : "report",
    "url" : "/services/data/v43.0/folders/00lR0000000Mf56IAC"
  } ],
  "totalSize" : 1,
  "url" : "/services/data/v43.0/folders/00lR0000000E84WIAS/children?page=1&pageSize=10"
}
```

Reports

Resources for the Reports API are available at `/services/data/`***`<latest API version>`***`/analytics/reports`. You can query each resource with a HTTP method (such as GET). Use these resources to integrate report data directly into your applications.

Resource	Supported HTTP Method	Description
Report	PATCH	Saves changes to a report.
	DELETE	Deletes a report.
Describe	GET	Gives report metadata. This includes information about fields that are defined in the report as detail columns, summaries, custom summary formulas, filters, and groupings.

Resource	Supported HTTP Method	Description
Execute Syte	GET	Gives report summary level data with or without details.
	POST	Returns specific results if you define dynamic filters, groupings, or aggregates in the metadata of a POST request.
Exexcute Async	POST	Returns an instance that stores summary level data with or without details for a report run asynchronously. To get specific results, define filters in the metadata of the request.
Instances List	GET	List of instances of a report that were requested for an asynchronous run.
Instance Results	GET	Depending on the type of your request, gives summary level data with or without details for an instance of a report run asynchronously.
Report List	GET	List of reports that were recently viewed by the API user.
	POST	Makes a copy of a report.
Report Fields	POST	If the request body is empty, returns a list of all possible report fields. Otherwise, returns a list of fields that specified reports share. Use the `fields` resource to determine the best fields for use in dashboard filters.

Report

Saves changes to a report or deletes a report.

Resource URL

Data	URL
Summary	`/services/data/<latest API version>/analytics/reports/<report ID>`

Formats

JSON

HTTP Methods

Method	Description
PATCH	Saves changes to a report. See this example.
DELETE	Deletes a report. See this example.

PATCH Request Body

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 216[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 217[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast.

Property	Type	Description
		Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.
`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other",`

Property	Type	Description

		<pre>"column": "TYPE",
		"operator": "notEqual"
		},
		{
		"value": "100,000",
		"column": "SALES",
		"operator": "greaterThan"
		},
		{
		"value": "Small",
		"column": "Size",
		"operator": "notEqual"
		}
		]
		}
		}</pre>

`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: <pre>"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]</pre>

Property	Type	Description
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

PATCH Response Body

Property	Type	Description
`reportMetadata`	Report metadata	Unique identifiers for groupings and summaries.
`reportTypeMetadata`	Report type metadata	Fields in each section of a report type plus filter information for those fields.
`reportExtendedMetadata`	Report extended metadata	Additional information about summaries and groupings.

Report metadata

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column.

Property	Type	Description
		• `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 206[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 206[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.

Property	Type	Description
groupingsAcross	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • BucketField_(*ID*) for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
groupingsDown	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • BucketField_(*ID*) for bucket fields. • ID of a custom field when the custom field is used for grouping.
hasDetailRows	Boolean	Indicates whether to include detailed data with the summary data.
hasRecordCount	Boolean	Indicates whether the report shows the record count.
historicalSnapshotDates	Array of strings	List of historical snapshot dates.
id	String	Unique report ID.
name	String	Display name of the report.
presentationOptions	Report presentation options	Display options in the Lightning Report Builder.
reportBooleanFilter	String	Logic to parse custom field filters. Value is null when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other", "column": "TYPE", "operator": "notEqual" }, { "value": "100,000", "column": "SALES", "operator": "greaterThan" }, { "value": "Small",`

Property	Type	Description

		<pre>"column": "Size",
		"operator": "notEqual"
		}
		]
		}
		}</pre>

`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: <pre>"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]</pre>
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.

Property	Type	Description
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Chart

Property	Type	Description
`chartType`	String	Type of chart.
`groupings`	String	Report grouping.
`hasLegend`	Boolean	Indicates whether the report has a legend.
`showChartValues`	Boolean	Indicates whether the report shows chart values.
`summaries`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID.
`summaryAxisLocations`	String	Specifies the axis that shows the summary values. Valid values are `X` and `Y`.
`title`	String	Name of the chart.

Groupings down

Property	Type	Description
`name`	String	API name of the field used as a row grouping.
`sortOrder`	String	Order in which data is sorted within a row grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field that's used as a row grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year • Calendar Month in Year • Calendar Day in Month
`sortAggregate`	String	Summary field that's used to sort data within a grouping in a report that's in summary format. Applies if you have the Aggregate Sort feature enabled as part of its pilot program. The value is null when data within a grouping is not sorted by a summary field. In this example, data grouped by Account Owner is sorted by the sum of Annual Revenue. `{ "aggregates": ["s!SALES","RowCount"], "groupingsDown": [ { "name": "USERS.NAME", "sortOrder": "Desc", "dateGranularity": "None", "sortAggregate": "s!SALES" } ] }`

Report presentation options

Property	Type	Description
`hasStackedSummaries`	Boolean	Indicates whether stacked summaries are enabled in the report.

Property	Type	Description
`historicalColumns`	Historical column presentation options	Presentation options of the historical column. `"presentationOptions" : { "historicalColumns" : { "Opportunity__hd.CloseDate__hst" : { "decreaseIsPositive" : false, "showChanges" : false }, "Opportunity__hd.Amount__hst" : { "decreaseIsPositive" : false, "showChanges" : true } } }`

Historical column presentation options

Property	Type	Description
`decreaseIsPositive`	Boolean	Indicates whether a negative change (decrease in value) is displayed in green instead of red in Lightning Report Builder.
`showChanges`	Boolean	Indicates whether to display a change column for a given historical column.

Groupings across

Property	Type	Description
`name`	String	API name of the field used as a column grouping.
`sortOrder`	String	Order in which data is sorted within a column grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field used as a column grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year

Property	Type	Description
		• Calendar Month in Year • Calendar Day in Month

Filter details

Property	Type	Description
`column`	String	Unique API name for the field that's being filtered.
`filterType`	String	Describes the type of value used to filter report data. Valid values are: • `fieldToField`—Filters report data by comparing values of one field with the values of a second field. • `fieldValue`—Filters report data by comparing values of a field with a defined value. • `null`—If null, the `filterType` defaults to `fieldValue`. In this example, the first filter is a field-to-field filter that compares the Amount field with Projected Amount field. The second filter is a field filter that returns records for which a row-level formula returns more than 0. `"reportFilters" : [ { "column" : "AMOUNT", "filterType" : "fieldToField", "isRunPageEditable" : true, "operator" : "notEqual", "value" : "PROJECTED_AMOUNT" }, { "column" : "CDF1", "filterType" : "fieldValue", "isRunPageEditable" : true, "operator" : "greaterThan", "value" : "0" } ]`
`isRunPageEditable`	Boolean	Indicates if this is an editable filter in the user interface.
`operator`	String	Unique API name for the condition used to filter a field such as "greater than" or "not equal to." Filter conditions depend on the data type of the field. Valid values are: • `equals` • `notEqual` • `lessThan` • `greaterThan` • `lessOrEqual` • `greaterOrEqual`

Property	Type	Description
		• `contains` • `notContain` • `startsWith` • `includes` • `excludes` • `within` (`DISTANCE` criteria only)
`value`	String	Value by which a field is filtered. For example, the field `Age` can be filtered by a numeric value. For datetime fields, if you make a POST request and specify a calendar date without including a time, then a default time gets included. The time defaults to midnight minus the difference between your timezone and Greenwich Mean Time (GMT). For example, if you specify 8/8/2015 and your timezone is Pacific Standard Time (GMT-700), then the API returns 2015-08-08T07:00:00Z.

Bucket field

Property	Type	Description
`bucketType`	BucketType	The type of bucket. Possible values are `number`, `percent`, and `picklist`
`developerName`	String	API name of the bucket.
`label`	String	User-facing name of the bucket.
`nullTreatedAsZero`	Boolean	Specifies whether null values are converted to zero (`true`) or not (`false`).
`otherBucketLabel`	String	Name of the fields grouped as "Other" (in buckets of `BucketType PICKLIST`).
`sourceColumnName`	String	Name of the bucketed field.
`values`	Array of BucketTypeValues	Describes the values included in the bucket field..

Bucket field value

Property	Type	Description
`label`	String	The user-facing name of the bucket.
`sourceDimensionValues`	String	A list of the values from the source field included in this bucket category (in buckets of type `PICKLIST` and buckets of type `TEXT`).

Property	Type	Description
`rangeUpperBound`	Double	The greatest range limit under which values are included in this bucket category (in buckets of type `NUMBER`).

Cross filter

Property	Type	Description
`criteria`	Array of Filter details[]	Information about how to filter the `relatedEntity`. Use to relate the primary entity with a subset of the `relatedEntity`.
`includesObject`	Boolean	Specifies whether objects returned have a relationship with the `relatedEntity` (true) or not (`false`).
`primaryEntityField`	String	The name of the object on which the cross filter is evaluated.
relatedEntity	String	The name of the object that the `primaryEntityField` is evaluated against. (The right-hand side of the cross filter).
relatedEntityJoinField	String	The name of the field used to join the `primaryEntityField` and `relatedEntity`.

Custom Detail Formula

Property	Type	Description
`decimalPlaces`	Integer	Formats the value returned by the row-level formula. It is required for numeric return values, invalid for non-numeric return values.
`description`	String	User-defined description of the row-level formula.
`formula`	String	Specifies the formula expression to be evaluated. All report type fields, except bucketed fields and historical tracking fields can be referenced.
`formulaType`	String	Specifies the return type of the formula. Valid values include: • date • datetime • number • text
`label`	String	Specifies a name for the row-level formula.

Custom summary formula

Property	Type	Description
`label`	String	The user-facing name of the custom summary formula.
`description`	String	The user-facing description of the custom summary formula.

Property	Type	Description
`formulaType`	String	The format of the numbers in the custom summary formula. Possible values are `number`, `currency`, and `percent`.
`decimalPlaces`	Integer	The number of decimal places to include in numbers.
`downGroup`	String	The name of a row grouping when the `downGroupType` is `CUSTOM`. `Null` otherwise.
`downGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.
`acrossGroup`	String	The name of a column grouping when the `accrossGroupType` is `CUSTOM`. `Null` otherwise.
`acrossGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.
`formula`	String	The operations performed on values in the custom summary formula.

Top rows

Property	Type	Description
`rowLimit`	Integer	The number of rows returned in the report.
`direction`	String	The sort order of the report rows.

Describe

Retrieves report, report type, and related metadata for a tabular, summary, or matrix report.

- Report metadata gives information about the report as a whole. Tells you such things as, the report type, format, the fields that are summaries, row or column groupings, filters saved to the report, and so on.
- Report type metadata tells you about all the fields available in the report type, those you can filter, and by what filter criteria.
- Report extended metadata tells you about the fields that are summaries, groupings, and contain record details in the report. A property that displays null indicates that its value is not available.

Resource URL

`/services/data/<latest API version>/analytics/reports/<report ID>/describe`

Formats

JSON

HTTP Methods

Method	Description
GET	Retrieves report, report type, and related metadata for a tabular, summary, or matrix report. See this example.

Response Body

Property	Type	Description
`reportMetadata`	Report metadata	Unique identifiers for groupings and summaries.
`reportTypeMetadata`	Report type metadata	Fields in each section of a report type plus filter information for those fields.
`reportExtendedMetadata`	Report extended metadata	Additional information about summaries and groupings.

Report metadata

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 216[]	Cross filters applied to the report.

Property	Type	Description
`customDetailFormula`	Custom Detail Formula on page 217[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.

Property	Type	Description
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.
`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other", "column": "TYPE", "operator": "notEqual" }, { "value": "100,000", "column": "SALES", "operator": "greaterThan" }, { "value": "Small", "column": "Size", "operator": "notEqual" } ] } }`
`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.

Property	Type	Description
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: `"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]`
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Chart

Property	Type	Description
`chartType`	String	Type of chart.
`groupings`	String	Report grouping.
`hasLegend`	Boolean	Indicates whether the report has a legend.
`showChartValues`	Boolean	Indicates whether the report shows chart values.
`summaries`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID.
`summaryAxisLocations`	String	Specifies the axis that shows the summary values. Valid values are `X` and `Y`.
`title`	String	Name of the chart.

Groupings down

Property	Type	Description
`name`	String	API name of the field used as a row grouping.
`sortOrder`	String	Order in which data is sorted within a row grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field that's used as a row grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year

Property	Type	Description
		• Calendar Month in Year • Calendar Day in Month
`sortAggregate`	String	Summary field that's used to sort data within a grouping in a report that's in summary format. Applies if you have the Aggregate Sort feature enabled as part of its pilot program. The value is null when data within a grouping is not sorted by a summary field. In this example, data grouped by Account Owner is sorted by the sum of Annual Revenue. `{ "aggregates": ["s!SALES","RowCount"], "groupingsDown": [ { "name": "USERS.NAME", "sortOrder": "Desc", "dateGranularity": "None", "sortAggregate": "s!SALES" } ] }`

Report presentation options

Property	Type	Description
`hasStackedSummaries`	Boolean	Indicates whether stacked summaries are enabled in the report.
`historicalColumns`	Historical column presentation options	Presentation options of the historical column. `"presentationOptions" : { "historicalColumns" : { "Opportunity__hd.CloseDate__hst" : { "decreaseIsPositive" : false, "showChanges" : false }, "Opportunity__hd.Amount__hst" : { "decreaseIsPositive" : false, "showChanges" : true } } }`

Historical column presentation options

Property	Type	Description
`decreaseIsPositive`	Boolean	Indicates whether a negative change (decrease in value) is displayed in green instead of red in Lightning Report Builder.
`showChanges`	Boolean	Indicates whether to display a change column for a given historical column.

Groupings across

Property	Type	Description
`name`	String	API name of the field used as a column grouping.
`sortOrder`	String	Order in which data is sorted within a column grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field used as a column grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year • Calendar Month in Year • Calendar Day in Month

Filter details

Property	Type	Description
`column`	String	Unique API name for the field that's being filtered.
`filterType`	String	Describes the type of value used to filter report data. Valid values are: • `fieldToField`—Filters report data by comparing values of one field with the values of a second field. • `fieldValue`—Filters report data by comparing values of a field with a defined value.

Property	Type	Description

		• `null`—If null, the `filterType` defaults to `fieldValue`.
		In this example, the first filter is a field-to-field filter that compares the Amount field with Projected Amount field. The second filter is a field filter that returns records for which a row-level formula returns more than 0.
		`"reportFilters" : [ {`
		`"column" : "AMOUNT",`
		`"filterType" : "fieldToField",`
		`"isRunPageEditable" : true,`
		`"operator" : "notEqual",`
		`"value" : "PROJECTED_AMOUNT"`
		`}, {`
		`"column" : "CDF1",`
		`"filterType" : "fieldValue",`
		`"isRunPageEditable" : true,`
		`"operator" : "greaterThan",`
		`"value" : "0"`
		`} ]`

`isRunPageEditable`	Boolean	Indicates if this is an editable filter in the user interface.
`operator`	String	Unique API name for the condition used to filter a field such as "greater than" or "not equal to." Filter conditions depend on the data type of the field. Valid values are: • `equals` • `notEqual` • `lessThan` • `greaterThan` • `lessOrEqual` • `greaterOrEqual` • `contains` • `notContain` • `startsWith` • `includes` • `excludes` • `within` (`DISTANCE` criteria only)
`value`	String	Value by which a field is filtered. For example, the field `Age` can be filtered by a numeric value. For datetime fields, if you make a POST request and specify a calendar date without including a time, then a default time gets included. The time defaults to midnight minus the difference between your timezone and Greenwich Mean Time (GMT). For example, if you specify 8/8/2015 and your timezone is Pacific

Property	Type	Description
		Standard Time (GMT-700), then the API returns 2015-08-08T07:00:00Z.

Bucket field

Property	Type	Description
`bucketType`	BucketType	The type of bucket. Possible values are `number`, `percent`, and `picklist`
`developerName`	String	API name of the bucket.
`label`	String	User-facing name of the bucket.
`nullTreatedAsZero`	Boolean	Specifies whether null values are converted to zero (`true`) or not (`false`).
`otherBucketLabel`	String	Name of the fields grouped as "Other" (in buckets of `BucketType` `PICKLIST`).
`sourceColumnName`	String	Name of the bucketed field.
`values`	Array of BucketTypeValues	Describes the values included in the bucket field..

Bucket field value

Property	Type	Description
`label`	String	The user-facing name of the bucket.
`sourceDimensionValues`	String	A list of the values from the source field included in this bucket category (in buckets of type `PICKLIST` and buckets of type `TEXT`).
`rangeUpperBound`	Double	The greatest range limit under which values are included in this bucket category (in buckets of type `NUMBER`).

Cross filter

Property	Type	Description
`criteria`	Array of Filter details[]	Information about how to filter the `relatedEntity`. Use to relate the primary entity with a subset of the `relatedEntity`.
`includesObject`	Boolean	Specifies whether objects returned have a relationship with the `relatedEntity` (true) or not (`false`).
`primaryEntityField`	String	The name of the object on which the cross filter is evaluated.

Property	Type	Description
relatedEntity	String	The name of the object that the `primaryEntityField` is evaluated against. (The right-hand side of the cross filter).
relatedEntityJoinField	String	The name of the field used to join the `primaryEntityField` and `relatedEntity`.

Custom Detail Formula

Property	Type	Description
`decimalPlaces`	Integer	Formats the value returned by the row-level formula. It is required for numeric return values, invalid for non-numeric return values.
`description`	String	User-defined description of the row-level formula.
`formula`	String	Specifies the formula expression to be evaluated. All report type fields, except bucketed fields and historical tracking fields can be referenced.
`formulaType`	String	Specifies the return type of the formula. Valid values include: • date • datetime • number • text
`label`	String	Specifies a name for the row-level formula.

Custom summary formula

Property	Type	Description
`label`	String	The user-facing name of the custom summary formula.
`description`	String	The user-facing description of the custom summary formula.
`formulaType`	String	The format of the numbers in the custom summary formula. Possible values are `number`, `currency`, and `percent`.
`decimalPlaces`	Integer	The number of decimal places to include in numbers.
`downGroup`	String	The name of a row grouping when the `downGroupType` is `CUSTOM`. `Null` otherwise.
`downGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.
`acrossGroup`	String	The name of a column grouping when the `accrossGroupType` is `CUSTOM`. `Null` otherwise.
`acrossGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.

Property	Type	Description
`formula`	String	The operations performed on values in the custom summary formula.

Top rows

Property	Type	Description
`rowLimit`	Integer	The number of rows returned in the report.
`direction`	String	The sort order of the report rows.

Report type metadata

Property	Type	Description
`categories`	Categories[]	Returns all row-level formulas in a report as an object identical to the other categories objects. For row-level formulas, these properties are always false: • allowedInCustomDetailFormula • Bucketable • Filterable • isCustom • isLookup For row-level formulas, these properties are always null: • filterValues • inactiveFilterValues
`dataTypeFilterOperatorMap`	Filter operator reference	Lists all the possible field data types that can be used to filter the report. Each data type, such as phone, percent, currency, or picklist has two properties: `name`: Of type string, this is a unique API name for each field type's filter criteria. Use this API name in the metadata to define filter criteria for a report. `label`: Of type string, this is the display name for each filter criteria available to fields of a particular data type. For example, `multipicklist` fields can have for filter criteria, "equals," "not equal to," "includes," and "excludes." Bucket fields are considered to be of `string` data type.
`dateGranularityInfos`	dateGranularityInfos[]	An array of objects each of which specifies a measure of time used to group date fields (day, week, month, fiscal quarter, and more).
`divisionInfo`	Division info[]	Default division and list of all possible record-level divisions that can be used in a report.

Property	Type	Description
`objects`	Objects info[]	List of objects included in report type. Available in API version 54.0 and later.
`scopeInfo`	Scope info[]	Scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`standardDateFilterDurationGroups`	Standard date filter duration groups[]	List of standard date filters available in reports.
`standardFilterInfos`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsJoinedFormat`	Boolean	Specifies whether a report type is compatible with joined reports (`true`) or not (`false`).

Categories

Property	Type	Description
`label`	String	Display name of a section in the report type under which fields are organized. For example, in an Accounts with Contacts custom report type, `Account General` is the display name of the section that has fields on general account information.
`columns`	Column map	Information for all fields in the report type organized under a particular section's unique API name.

Column map

Property	Type	Description
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field is whether a field is can be referenced in a row-level formula (`true`) or not (`false`).
`bucketable`	Boolean	Specifies whether a field can be used as the basis for a bucket column (`true`) or not (`false`).
`dataType`	String	Data type of the field.
`entityColumnName`	String	Describes the relationship between an sObject and a report field by returning the sObject and sObject field name that a report field maps to. The value returned is formatted as ***`sObject.sObject field`***. The property is part of an object that describes a report

Property	Type	Description
		field, such as an object in the `columns[]` array of a report type object from `reportTypeMetadata`. For example, on the `LAST_UPDATE_BY` column, the value of `entityColumnName` is `"User.Name"`, which tells us that it's mapped to the `Name` field on the `User` sObject. `"reportTypeMetadata" : { "categories" : [{ "columns" : { "LAST_UPDATE_BY" : { "allowedInCustomDetailFormula" : true, "bucketable" : true, "dataType" : "string", "entityColumnName" : "User.Name", "fieldToFieldFilterable" : false, "filterValues" : [ ], "filterable" : true, "inactiveFilterValues" : [ ], "isCustom" : false, "isLookup" : true, "label" : "Last Modified By", "maxLength" : null, "uniqueCountable" : true } } }] }`  Note: Row-level formulas aren't directly mapped to sObject fields like report fields, but they still have an `entityColumnName` property. For row-level formulas, the value of `entityColumnName` is `CDF1`.
`fieldToFieldFilterable`	Boolean	Specifies whether a field can be referenced in a field-to-field filter (`true`) or not (`false`).
`filterValues`	String array	All filter values for a field, if the field data type is of picklist, multi-select picklist, boolean, or checkbox. For example, checkbox fields always have a value of `True` or `False`. For fields of other data types, the filter value is an empty array because their values can't be determined. Filter values have two properties: `name`: Unique API name for a filter value. Of type string. `label`: Display name of a filter value. Of type string.
`filterable`	Boolean	`False` means that the field is of a type that can't be filtered. For example, fields of the type `Encrypted Text` can't be filtered.

Property	Type	Description
`isCustom`	Boolean	Specifies whether a column is a custom (`true`) or standard (`false`) field.
`isLookup`	Boolean	Specifies whether a field is a lookup (`true`) or not (`false`).
`label`	String	Display name of a field.
`maxLength`	Integer	Indicates the maximum permited number of characters for the value of a column field. If there is no limit, use `null`.
`uniqueCountable`	Boolean	Specifies whether a field supports unique count (`true`) or not (`false`)

`dateGranularityInfos`

Property	Type	Description
`label`	String	The name of the time measure as it appears in the application.
`value`	String	API name of the time measure.

Division Info

Property	Type	Description
`defaultValue`	String	Users are assigned a default division that applies to their newly created accounts, leads, and custom objects that are enabled for divisions.
`values`	String	All division values. Division values have two properties: `label`: Display name of a division. `name`: Unique API name of a division.

Objects Info

Property	Type	Description
`apiName`	String	API name of the object.
`joinType`	String	Present for custom report types. Indicates how the object is joined. Valid values are: • `ROOT`—Primary object • `INNER`—Inner join • `OUTER`—Outer join
`label`	String	Display name of the object.

Scope Info

Property	Type	Description
`defaultValue`	String	Default scope of the data on which you run the report.
`values`	Array of strings	All scope values. Valid values depend on the report type. Scope values have the following properties: `allowsDivision`: Allows you to segment the report by this scope. `label`: Display name of the scope. `value`: Value of the scope.

Standard date filter duration groups

Property	Type	Description
`label`	String	Display name of the standard date filter grouping. Valid values are Calendar Year, Calendar Quarter, Calendar Month, Calendar Week, Fiscal Year, Fiscal Quarter, Day and custom value based on a user-defined date range.
`standardDateFilterDurations`	Standard date filter durations[]	Details about each possible relative date filter defined under the standard date filter grouping.

Standard date filter durations

Property	Type	Description
`endDate`	String	End date of a date filter.
`label`	String	Display name of a date filter. Valid date filters are relative date filters—like `Current FY` and `Current FQ`—and custom date filters.
`startDate`	String	Start date of a date filter.
`value`	String	API name of a date filter. Valid date filters are relative date filters—like `THIS_FISCAL_YEAR` and `NEXT_FISCAL_QUARTER`—and custom date filters.

Report extended metadata

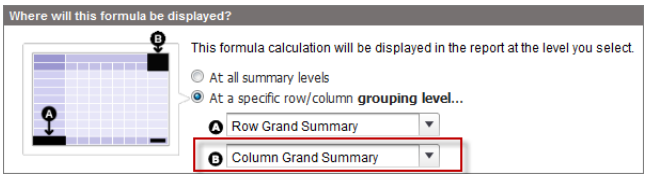
Property	Type	Description
`aggregateColumnInfo`	Aggregate column information	Includes all report summaries such as, `Record Count`, `Sum`, `Average`, `Max`, `Min`, and custom summary formulas. Contains values for each summary listed in the report metadata aggregates.

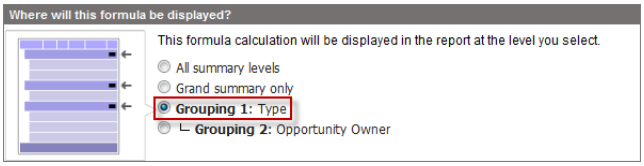
Property	Type	Description
`detailColumnInfo`	Detail column information	Two properties for each field that has detailed data identified by its unique API name. The detailed data fields are also listed in the report metadata.
`groupingColumnInfo`	Grouping column information	Map of each row or column grouping to its metadata. Contains values for each grouping identified in the groupingsDown and groupingsAcross list.
`historicalColumnInfo`	Historical column information	Provides additional information on columns that exist only in historical trending reports. (This property is applicable only to historical trending reports.)

Aggregate column information

Property	Type	Description
`label`	String	Display name for record count, or the summarized or custom summary formula field.
`dataType`	String	Data type of the summarized or custom summary formula field.
`acrossGroupingContext`	String	Column grouping in the report where the custom summary formula is displayed. As this example shows in the JSON response and in the custom summary formula editor of the matrix report, the custom summary formula is set at the grand summary level for the columns.

```
{
   "reportExtendedMetadata" : {
      "aggregateColumnInfo" : {
         "FORMULA1" : {
            "label" : "Stalled Oppty Avg",
            "dataType" : "Percent",
            "acrossGroupingContext" :
"GRAND_SUMMARY",
            "downGroupingContext" :
"GRAND_SUMMARY"
         },
      }
   }
}
```



Property	Type	Description
`downGroupingContext`	String	Row grouping in the report where the custom summary formula is displayed. In this example, the custom summary formula for a summary report is displayed at the first grouping level This example is shown in both the JSON response and in the custom summary formula editor of the summary report. `{ "reportExtendedMetadata" : { "aggregateColumnInfo" : { ...}, "FORMULA1" : { "label" : "Average Won", "dataType" : "Number", "acrossGroupingContext" : null, "downGroupingContext" : "TYPE" }, } }` 

Detail column information

Property	Type	Description
`label`	String	The localized display name of a standard field, the ID of a custom field, or the API name of a bucket field that has detailed data.
`dataType`	String	The data type of the field that has detailed data. Possible values are: • `string` • `boolean` • `combobox` • `currency` • `date` • `datetime` • `double` • `email` • `html`

Property	Type	Description
		• id • int • multipicklist • number • percent • phone • picklist • reference • text • textarea • time • url
entityColumnName	String	Describes the relationship between an sObject and a report field by returning the sObject and sObject field name that a report field maps to. The value returned is formatted as ***sObject.sObject field***. The property is part of an object that describes a report field, such as an object in the columns[] array of a report type object from reportTypeMetadata. For example, on the LAST_UPDATE_BY column, the value of entityColumnName is "User.Name", which tells us that it's mapped to the Name field on the User sObject. `"reportTypeMetadata" : { "categories" : [{ "columns" : { "LAST_UPDATE_BY" : { "allowedInCustomDetailFormula" : true, "bucketable" : true, "dataType" : "string", "entityColumnName" : "User.Name", "fieldToFieldFilterable" : false, "filterValues" : [ ], "filterable" : true, "inactiveFilterValues" : [ ], "isCustom" : false, "isLookup" : true, "label" : "Last Modified By", "maxLength" : null, "uniqueCountable" : true } }`

Property	Type	Description

		<pre>}]
		}</pre>
		Note: Row-level formulas aren't directly mapped to sObject fields like report fields, but they still have an `entityColumnName` property. For row-level formulas, the value of `entityColumnName` is `CDF1`.

`filterValues`	String array	All filter values for a field, if the field data type is of picklist, multi-select picklist, boolean, or checkbox. For example, checkbox fields always have a value of `True` or `False`. For fields of other data types, the filter value is an empty array because their values can't be determined. Filter values have two properties: `name`: Unique API name for a filter value. Of type string. `label`: Display name of a filter value. Of type string.
`filterable`	Boolean	`False` means that the field is of a type that can't be filtered. For example, fields of the type `Encrypted Text` can't be filtered.
`isLookup`	Boolean	Specifies whether a field is a lookup (`true`) or not (`false`).
`label`	String	Display name of a field.
`uniqueCountable`	Boolean	Specifies whether a field supports unique count (`true`) or not (`false`)

Grouping column information

Property	Type	Description
`label`	String	Display name of the field or bucket field used for grouping.
`dataType`	String	Data type of the field used for grouping. Possible values are: • `string` • `boolean` • `combobox` • `currency` • `date` • `datetime` • `double` • `email` • `html` • `id` • `int` • `multipicklist`

Property	Type	Description
		• number • percent • phone • picklist • reference • text • textarea • time • url
groupingLevel	Integer	Level of the grouping. Value can be: • 0, 1, or 2. Indicates first, second, or third row level grouping in summary reports. • 0 or 1. Indicates first or second row or column level grouping in a matrix report.

Historical column information

Property	Type	Description
baseField	String	Indicates the base column for the historical data. Example: For the historical column Opportunity__hd.Amount__hst.N_DAYS_AGO:1, which represents the historical Amount column from one day ago in an Opportunity report, the base column is Opportunity.Amount.
historicalColumn	String	The specific historical column name. Example: The historical column for Opportunity__hd.Amount__hst.N_DAYS_AGO:1 is Opportunity__hd.Amount__hst.
historicalSnapshotDate	String	The snapshot date for this historical column. Example: For the historical column Opportunity__hd.Amount__hst.N_DAYS_AGO:1, the snapshot date is N_DAYS_AGO:1, which is one day ago.
isHistoricalChange	Boolean	True if the column represents change between two historical columns.

SEE ALSO:

Execute Sync

Execute Async

Execute Sync

Runs a report immediately with or without changing filters, groupings, or aggregates and returns the latest summary data with or without details for your level of access.

Resource URL

```
/services/data/<latest API version>/analytics/reports/<report ID>
```

Formats

JSON

HTTP Methods

Method	Description
GET	Get report results. See this example.
POST	Get specific results by passing dynamic filters, groupings, and aggregates in the report metadata. See this example.

POST Request Body

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.

Property	Type	Description
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 216[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 217[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.

Property	Type	Description
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.
`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other", "column": "TYPE", "operator": "notEqual" }, { "value": "100,000", "column": "SALES", "operator": "greaterThan" }, { "value": "Small", "column": "Size", "operator": "notEqual" } ] } }`
`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK`

Property	Type	Description
		The `MULTI_BLOCK` property is available in API version 43.0 and later.
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: `"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]`
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Response Body

Property	Type	Description
`allData`	Boolean	When `True`, all report results are returned. When `False`, results are returned for the same number of rows as a report run in Salesforce. Note: For reports that have too many records, use filters to refine results.
`attributes`	Attributes	Key report attributes and child resource URLs.
`factMap`	Fact map	Summary level data or both summary and detailed data for each row or column grouping. Detailed data is available if `hasDetailRows` is `true`. Each row or column grouping is represented by combination of row and column grouping keys defined in Groupings down and Groupings across. See these examples of fact map keys.
`groupingsAcross`	Groupings across	Collection of column groupings, keys, and their values.
`groupingsDown`	Groupings down	Collection of row groupings, keys, and their values.
`hasDetailRows`	Boolean	When `true`,the fact map returns values for both summary level and record level data. When `false`, the fact map returns summary values.
`hasExceededTabularRowLimit`	Boolean	When `True`, returns results for the same number of rows as a report run in Salesforce. For a report on Salesforce Objects, total and subtotal rows don't count toward this limit. For a report on Data 360 Objects, total and subtotal rows do count toward this limit. When `False`, all report results are returned.
`reportExtendedMetadata`	Report extended metadata	Additional information about columns, summaries, and groupings.
`reportMetadata`	Report metadata	Unique identifiers for groupings and summaries.

Attributes

Property	Type	Description
`describeUrl`	String	Resource URL to get report metadata.
`instancesUrl`	String	Resource URL to run a report asynchronously. The report can be run with or without filters to get summary or both summary and

Property	Type	Description
		detailed data. Results of each instance of the report run are stored under this URL.
`type`	String	API resource format.
`reportName`	String	Display name of the report.
`reportId`	String	Unique report ID.

Fact map

Property	Type	Description
`rows`	Data cells[]	Array of detailed report data listed in the order of the detail columns provided by the report metadata.
`aggregates`	Aggregates[]	Summary level data including record count for a report.

Data cells

Property	Type	Description
`value`	Detail column info data type	The value of a specified cell. If the response is an empty string, then API version 36.0 and earlier returns null. API version 37.0 and later returns an empty string.
`label`	String	Display name of the value as it appears for a specified cell in the report.

Aggregates

Property	Type	Description
`value`	Number	Numeric value of the summary data for a specified cell.
`label`	String	Formatted summary data for a specified cell.

Groupings across

Property	Type	Description
`groupings`	Groupings[]	Information for each column grouping as a list.

Groupings

Property	Type	Description
`value`	String	Value of the field used as a row or column grouping. The value depends on the field's data type. • Currency fields: – `amount`: Of type currency. Value of a data cell. – `currency`: Of type picklist. The ISO 4217 currency code, if available; for example, USD for US dollars or CNY for Chinese yuan. (If the grouping is on the converted currency, this is the currency code for the report and not for the record.) • Picklist fields: API name. For example, a custom picklist field, `Type of Business` with values 1, 2, 3 for Consulting, Services, and Add-On Business, has `1`, `2`, or `3` as the grouping value. • ID fields: API name. • Record type fields: API name. • Date and time fields: Date or time in ISO-8601 format. • Lookup fields: Unique API name. For example, for the `Opportunity Owner` lookup field, the ID of each opportunity owner's Chatter profile page can be a grouping value.
`key`	String	Unique identity for a row or column grouping. The identity is used by the fact map to specify data values within each grouping.
`label`	String	Display name of a row or column grouping. For date and time fields, the label is the localized date or time.
`groupings`	Array	Second or third level row or column groupings. If there are none, the value is an empty array.
`dategroupings`	Array	Start date and end date of the interval defined by `date granularity`.

Groupings down

Property	Type	Description
`groupings`	Groupings[]	Information for each row grouping as a list.

SEE ALSO:

Describe

Execute Async

Execute Async

Runs an instance of a report asynchronously with or without filters and returns a handle that stores the results of the run. The results can contain summary data with or without details.

Resource URL

```
/services/data/<latest API version>/analytics/reports/<report ID>/instances
```

Formats

JSON

HTTP Methods

Method	Description
POST	Runs an instance of a report asynchronously. See this example. Also see this example of a GET request that returns a list of asynchronous runs of a report.

POST Request Body

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.
`chart`	Chart[]	Details about the chart used in a report.

Property	Type	Description
`crossFilters`	Cross filter on page 216[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 217[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.

Property	Type	Description
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.
`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other", "column": "TYPE", "operator": "notEqual" }, { "value": "100,000", "column": "SALES", "operator": "greaterThan" }, { "value": "Small", "column": "Size", "operator": "notEqual" } ] } }`
`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.

Property	Type	Description
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: `"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]`
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Response Body

Property	Type	Description
`id`	String	Unique ID for an instance of a report that was run asynchronously.
`status`	String	• `New` if the report run has just been triggered through a request. • `Success` if the report ran. • `Running` if the report is being run. • `Error` if the report run failed. The instance of a report run can return an error if, for example, your permission to access the report has been removed since you requested the run.
`url`	String	URL where results of the report run for that instance are stored. The value is `null` if the report couldn't be run because of an error.
`ownerId`	String	API name of the user that created the instance.
`completionDate`	Date, time string	Date, time when the instance of the report run finished. Only available if the report instance ran successfully or couldn't be run because of an error. Date-time information is in ISO-8601 format.
`hasDetailRows`	Boolean	• When `false`, indicates that summary level data was requested for the report instance. • When `true`, indicates that detailed data, which includes summary level data, was requested for the report instance.
`requestDate`	Date, time string	Date and time when an instance of the report run was requested. Date-time information is in ISO-8601 format.

SEE ALSO:

Describe

Execute Sync

Instances List

Returns a list of instances for a report that you requested to be run asynchronously. Each item in the list is treated as a separate instance of the report run with metadata in that snapshot of time.

Resource URL

```
/services/data/<latest API version>/analytics/reports/<report ID>/instances
```

Formats

JSON

HTTP Methods

Method	Description
GET	Return a list of asynchronous runs of a report. See this example.

Response Body

Property	Type	Description
`id`	String	Unique ID for a report instance that was requested for a run. The ID is used to obtain results of the report run for that instance.
`status`	String	• `New` if the report run has just been triggered through a POST request. • `Success` if the report ran. • `Running` if the report is being run. • `Error` if the report run failed. The instance of a report run can return an error if, for example, your permission to access the report has been removed since you requested the run.
`url`	String	URL where results of the report run for that instance are stored. The value is `null` if the report couldn't be run because of an error.
`ownerId`	String	API name of the user that created the instance.
`hasDetailRows`	Boolean	• When `false`, indicates that summary level data was requested for the report run. • When `true`, indicates that detailed data, which includes summary level data, was requested for the report run.
`completionDate`	Date, time string	Date, time when the instance of the report run finished. Only available if the report instance ran successfully or couldn't be run because of an error. Date-time information is in ISO-8601 format.
`requestDate`	Date, time string	Date and time when an instance of the report run was requested. Date-time information is in ISO-8601 format.

SEE ALSO:

Execute Async

Instance Results

Instance Results

Retrieves results for an instance of a report run asynchronously with or without filters. Depending on your asynchronous report run request, data can be at the summary level or include details.

Resource URL

```
/services/data/<latest API version>/analytics/reports/<report ID>/instances/<instance ID>
```

Formats

JSON

HTTP Methods

Method	Description
GET	Retrieves results of an asynchronous report run. See this example.
DELETE	If the given report instance has a `status` of `Success` or `Error`, delete the report instance and return an empty response body.

GET Response Body

Property	Type	Description
`allData`	Boolean	When `True`, all report results are returned. When `False`, returns results for the same number of rows as a report run in Salesforce.
`attributes`	Attributes	Attributes for the instance of the report run.
`factMap`	Fact map	Collection of summary level data or both detailed and summary level data.
`groupingsAcross`	Groupings across	Collection of column groupings.
`groupingsDown`	Groupings down	Collection of row groupings.
`hasDetailRows`	Boolean	• When `false`, report results are at summary level. • When `true`, report results are at the record detail level.
`hasExceededTabularRowLimit`	Boolean	When `True`, returns the same number of rows as a report run in Salesforce. For a report on Salesforce Objects, total and subtotal rows don't count toward this limit. For a report on Data 360 Objects, total and subtotal rows do count toward this limit. When `False`, all report results are returned.
`reportExtendedMetadata`	Report extended metadata	Information on report groupings, summary fields, and detailed data columns, which is available if detailed data is requested.
`reportMetadata`	Report metadata	Information about the fields used to build the report.

Attributes

Property	Type	Description
`id`	String	Unique ID for an instance of a report that was run.
`status`	String	• `New` if the report run has just been triggered through a request. • `Success` if the report ran. • `Running` if the report is being run. • `Error` if the report run failed. The instance of a report run can return an error if, for example, your permission to access the report has been removed since you requested the run.
`ownerId`	String	API name of the user that created the instance.
`completionDate`	Date, time string	Date, time when the instance of the report run finished. Only available if the report instance ran successfully or couldn't be run because of an error. Date-time information is in ISO-8601 format.
`requestDate`	Date, time string	Date and time when an instance of the report run was requested. Date-time information is in ISO-8601 format.
`type`	String	Format of the resource.
`reportId`	String	Unique report ID.
`reportName`	String	Display name of the report.

SEE ALSO:

Execute Async

Instances List

Report List

Displays a list of up to 200 tabular, matrix, or summary reports that you recently viewed. To get a full list of reports by format, name, and other fields, use a SOQL query on the Report object. The resource can also be used to make a copy of a report.

Resource URL

Task	URL
List reports	`/services/data/<latest API version>/analytics/reports`
Copy report	`/services/data/<latest API version>/analytics/reports?cloneId=<report ID>`

Formats

JSON

HTTP Methods

Method	Description
GET	List of reports that were recently viewed by the API user. See this example.
POST	Create or clone a report. To create a new report, see this example. To clone an existing report, see this example.

GET Response Body

Property	Type	Description
`name`	String	Report display name.
`id`	String	Unique report ID.
`url`	String	URL that returns report data.
`describeUrl`	String	URL that retrieves report metadata.
`instancesUrl`	String	Information for each instance of the report that was run asynchronously.

POST Response Body

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column.

Property	Type	Description
		• `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 216[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 217[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.

Property	Type	Description
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.
`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other", "column": "TYPE", "operator": "notEqual" }, { "value": "100,000",`

Property	Type	Description

		<pre>"column": "SALES",
		"operator": "greaterThan"
		},
		{
		"value": "Small",
		"column": "Size",
		"operator": "notEqual"
		}
		]
		}
		}</pre>

`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: <pre>"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]</pre>
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.'

Property	Type	Description
		`startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Query

Returns report data without saving changes to an existing report or creating a new one.

Resource URL

`/services/data/<latest API version>/analytics/reports/query`

Formats

JSON

HTTP Methods

Method	Description
POST	Run a report without creating or saving the report. Customize your report using `reportMetadata` that you specify in the request body. See this example on page 60.

Request Body

Report metadata

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 256[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 256[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.

Property	Type	Description
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.

`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified.
		
		This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3."
		
		`{`
		`...`
		`"reportBooleanFilter": "(1 OR 2) AND 3",`

Property	Type	Description

		<pre>"reportFilters": [
		{
		"value":
		"Analyst,Integrator,Press,Other",
		"column": "TYPE",
		"operator": "notEqual"
		},
		{
		"value": "100,000",
		"column": "SALES",
		"operator": "greaterThan"
		},
		{
		"value": "Small",
		"column": "Size",
		"operator": "notEqual"
		}
		]
		}
		}</pre>

`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX` • `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.

Property	Type	Description
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: `"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]`
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Chart

Property	Type	Description
`chartType`	String	Type of chart.
`groupings`	String	Report grouping.
`hasLegend`	Boolean	Indicates whether the report has a legend.
`showChartValues`	Boolean	Indicates whether the report shows chart values.
`summaries`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column.

Property	Type	Description
		• `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID.
`summaryAxisLocations`	String	Specifies the axis that shows the summary values. Valid values are `X` and `Y`.
`title`	String	Name of the chart.

Groupings down

Property	Type	Description
`name`	String	API name of the field used as a row grouping.
`sortOrder`	String	Order in which data is sorted within a row grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field that's used as a row grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year • Calendar Month in Year • Calendar Day in Month
`sortAggregate`	String	Summary field that's used to sort data within a grouping in a report that's in summary format. Applies if you have the Aggregate Sort feature enabled as part of its pilot program. The value is null when data within a grouping is not sorted by a summary field. In this example, data grouped by Account Owner is sorted by the sum of Annual Revenue. `{ "aggregates": ["s!SALES","RowCount"], "groupingsDown": [`

Property	Type	Description

		<pre>{
		"name": "USERS.NAME",
		"sortOrder": "Desc",
		"dateGranularity": "None",
		"sortAggregate": "s!SALES"
		}
		]
		}</pre>

Report presentation options

Property	Type	Description
`hasStackedSummaries`	Boolean	Indicates whether stacked summaries are enabled in the report.

`historicalColumns`	Historical column presentation options	Presentation options of the historical column.
		<pre>"presentationOptions" : {
		"historicalColumns" : {
		"Opportunity__hd.CloseDate__hst" : {
		"decreaseIsPositive" : false,
		"showChanges" : false
		},
		"Opportunity__hd.Amount__hst" : {
		"decreaseIsPositive" : false,
		"showChanges" : true
		}
		}
		}</pre>

Historical column presentation options

Property	Type	Description
`decreaseIsPositive`	Boolean	Indicates whether a negative change (decrease in value) is displayed in green instead of red in Lightning Report Builder.
`showChanges`	Boolean	Indicates whether to display a change column for a given historical column.

Groupings across

Property	Type	Description
`name`	String	API name of the field used as a column grouping.

Property	Type	Description
`sortOrder`	String	Order in which data is sorted within a column grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field used as a column grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year • Calendar Month in Year • Calendar Day in Month

Filter details

Property	Type	Description
`column`	String	Unique API name for the field that's being filtered.

`filterType`	String	Describes the type of value used to filter report data. Valid values are:
		• `fieldToField`—Filters report data by comparing values of one field with the values of a second field.
		• `fieldValue`—Filters report data by comparing values of a field with a defined value.
		• `null`—If null, the `filterType` defaults to `fieldValue`.
		In this example, the first filter is a field-to-field filter that compares the Amount field with Projected Amount field. The second filter is a field filter that returns records for which a row-level formula returns more than 0.
		`"reportFilters" : [ {`
		`"column" : "AMOUNT",`
		`"filterType" : "fieldToField",`
		`"isRunPageEditable" : true,`
		`"operator" : "notEqual",`
		`"value" : "PROJECTED_AMOUNT"`
		`}, {`
		`"column" : "CDF1",`
		`"filterType" : "fieldValue",`

Property	Type	Description

		<pre>"isRunPageEditable" : true,
		"operator" : "greaterThan",
		"value" : "0"
		}]</pre>

`isRunPageEditable`	Boolean	Indicates if this is an editable filter in the user interface.
`operator`	String	Unique API name for the condition used to filter a field such as "greater than" or "not equal to." Filter conditions depend on the data type of the field. Valid values are: • `equals` • `notEqual` • `lessThan` • `greaterThan` • `lessOrEqual` • `greaterOrEqual` • `contains` • `notContain` • `startsWith` • `includes` • `excludes` • `within` (`DISTANCE` criteria only)
`value`	String	Value by which a field is filtered. For example, the field `Age` can be filtered by a numeric value. For datetime fields, if you make a POST request and specify a calendar date without including a time, then a default time gets included. The time defaults to midnight minus the difference between your timezone and Greenwich Mean Time (GMT). For example, if you specify 8/8/2015 and your timezone is Pacific Standard Time (GMT-700), then the API returns 2015-08-08T07:00:00Z.

Bucket field

Property	Type	Description
`bucketType`	BucketType	The type of bucket. Possible values are `number`, `percent`, and `picklist`
`developerName`	String	API name of the bucket.
`label`	String	User-facing name of the bucket.

Property	Type	Description
`nullTreatedAsZero`	Boolean	Specifies whether null values are converted to zero (`true`) or not (`false`).
`otherBucketLabel`	String	Name of the fields grouped as "Other" (in buckets of `BucketType` `PICKLIST`).
`sourceColumnName`	String	Name of the bucketed field.
`values`	Array of BucketTypeValues	Describes the values included in the bucket field..

Bucket field value

Property	Type	Description
`label`	String	The user-facing name of the bucket.
`sourceDimensionValues`	String	A list of the values from the source field included in this bucket category (in buckets of type `PICKLIST` and buckets of type `TEXT`).
`rangeUpperBound`	Double	The greatest range limit under which values are included in this bucket category (in buckets of type `NUMBER`).

Cross filter

Property	Type	Description
`criteria`	Array of Filter details[]	Information about how to filter the `relatedEntity`. Use to relate the primary entity with a subset of the `relatedEntity`.
`includesObject`	Boolean	Specifies whether objects returned have a relationship with the `relatedEntity` (true) or not (`false`).
`primaryEntityField`	String	The name of the object on which the cross filter is evaluated.
relatedEntity	String	The name of the object that the `primaryEntityField` is evaluated against. (The right-hand side of the cross filter).
relatedEntityJoinField	String	The name of the field used to join the `primaryEntityField` and `relatedEntity`.

Custom Detail Formula

Property	Type	Description
`decimalPlaces`	Integer	Formats the value returned by the row-level formula. It is required for numeric return values, invalid for non-numeric return values.
`description`	String	User-defined description of the row-level formula.

Property	Type	Description
`formula`	String	Specifies the formula expression to be evaluated. All report type fields, except bucketed fields and historical tracking fields can be referenced.
`formulaType`	String	Specifies the return type of the formula. Valid values include: • date • datetime • number • text
`label`	String	Specifies a name for the row-level formula.

Custom summary formula

Property	Type	Description
`label`	String	The user-facing name of the custom summary formula.
`description`	String	The user-facing description of the custom summary formula.
`formulaType`	String	The format of the numbers in the custom summary formula. Possible values are `number`, `currency`, and `percent`.
`decimalPlaces`	Integer	The number of decimal places to include in numbers.
`downGroup`	String	The name of a row grouping when the `downGroupType` is `CUSTOM`. `Null` otherwise.
`downGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.
`acrossGroup`	String	The name of a column grouping when the `accrossGroupType` is `CUSTOM`. `Null` otherwise.
`acrossGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.
`formula`	String	The operations performed on values in the custom summary formula.

Top rows

Property	Type	Description
`rowLimit`	Integer	The number of rows returned in the report.
`direction`	String	The sort order of the report rows.

Response Body

Property	Type	Description
`allData`	Boolean	When `True`, all report results are returned. When `False`, results are returned for the same number of rows as a report run in Salesforce. Note: For reports that have too many records, use filters to refine results.
`attributes`	Attributes	Key report attributes and child resource URLs.
`factMap`	Fact map	Summary level data or both summary and detailed data for each row or column grouping. Detailed data is available if `hasDetailRows` is `true`. Each row or column grouping is represented by combination of row and column grouping keys defined in Groupings down and Groupings across. See these examples of fact map keys.
`groupingsAcross`	Groupings across	Collection of column groupings, keys, and their values.
`groupingsDown`	Groupings down	Collection of row groupings, keys, and their values.
`hasDetailRows`	Boolean	When `true`,the fact map returns values for both summary level and record level data. When `false`, the fact map returns summary values.
`hasExceededTabularRowLimit`	Boolean	When `True`, returns results for the same number of rows as a report run in Salesforce. For a report on Salesforce Objects, total and subtotal rows don't count toward this limit. For a report on Data 360 Objects, total and subtotal rows do count toward this limit. When `False`, all report results are returned.
`reportExtendedMetadata`	Report extended metadata	Additional information about columns, summaries, and groupings.
`reportMetadata`	Report metadata	Unique identifiers for groupings and summaries.

Attributes

Property	Type	Description
`describeUrl`	String	Resource URL to get report metadata.
`instancesUrl`	String	Resource URL to run a report asynchronously. The report can be run with or without filters to get summary or both summary and

Property	Type	Description
		detailed data. Results of each instance of the report run are stored under this URL.
`type`	String	API resource format.
`reportName`	String	Display name of the report.
`reportId`	String	Unique report ID.

Fact map

Property	Type	Description
`rows`	Data cells[]	Array of detailed report data listed in the order of the detail columns provided by the report metadata.
`aggregates`	Aggregates[]	Summary level data including record count for a report.

Data cells

Property	Type	Description
`value`	Detail column info data type	The value of a specified cell. If the response is an empty string, then API version 36.0 and earlier returns null. API version 37.0 and later returns an empty string.
`label`	String	Display name of the value as it appears for a specified cell in the report.

Aggregates

Property	Type	Description
`value`	Number	Numeric value of the summary data for a specified cell.
`label`	String	Formatted summary data for a specified cell.

Groupings across

Property	Type	Description
`groupings`	Groupings[]	Information for each column grouping as a list.

Groupings

Property	Type	Description
`value`	String	Value of the field used as a row or column grouping. The value depends on the field's data type. • Currency fields: – `amount`: Of type currency. Value of a data cell. – `currency`: Of type picklist. The ISO 4217 currency code, if available; for example, USD for US dollars or CNY for Chinese yuan. (If the grouping is on the converted currency, this is the currency code for the report and not for the record.) • Picklist fields: API name. For example, a custom picklist field, `Type of Business` with values 1, 2, 3 for Consulting, Services, and Add-On Business, has `1`, `2`, or `3` as the grouping value. • ID fields: API name. • Record type fields: API name. • Date and time fields: Date or time in ISO-8601 format. • Lookup fields: Unique API name. For example, for the `Opportunity Owner` lookup field, the ID of each opportunity owner's Chatter profile page can be a grouping value.
`key`	String	Unique identity for a row or column grouping. The identity is used by the fact map to specify data values within each grouping.
`label`	String	Display name of a row or column grouping. For date and time fields, the label is the localized date or time.
`groupings`	Array	Second or third level row or column groupings. If there are none, the value is an empty array.
`dategroupings`	Array	Start date and end date of the interval defined by `date granularity`.

Groupings down

Property	Type	Description
`groupings`	Groupings[]	Information for each row grouping as a list.

Report Fields

The Report Fields resource returns report fields available for specified reports. Use the resource to determine the best fields for use in dashboard filters by seeing which fields different source reports have in common. Available in API version 40.0 and later.

Resource URL

```
/services/data/<latest API version>/analytics/reports/<report ID>/fields
```

Formats

JSON

HTTP Methods

Method	Description
POST	If the request body is empty, returns a list of all possible report fields. Otherwise, returns a list of fields that specified reports share.

POST Request Body

Property	Type	Description
`intersectWith`	Array of Report IDs	An array of unique report IDs.

POST Response Body

Property	Type	Description
`displayGroups`	Array of Fields	Fields available when adding a filter.
`equivalentFields`	Array of Fields	Fields available for each specified report. Each object in this array is a list of common fields categorized by report type.
`equivalentFieldIndices`	Map of Fields	Map of each field's API name to the index of the field in the `equivalentFields` array.
`mergedGroups`	Array of Fields	Merged fields.

Example Request Body

```
{
   "intersectWith": ["00OR0000000P3RVMA0"]
}
```

Example Response Body

```
{
  "displayGroups" : {
    "Opportunity" : [ {
      "columns" : {
```

```
      "ACCOUNT_CREATED_DATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Account: Created Date",
        "maxLength" : null
      },
      "ACCOUNT_LAST_ACTIVITY" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Account: Last Activity",
        "maxLength" : null
      },
      "ACCOUNT_LAST_UPDATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Account: Last Modified Date",
        "maxLength" : null
      },
      "ACCOUNT_OWNER" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Account Owner",
        "maxLength" : null
      },
      "ACCOUNT_OWNER_ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : true,
        "label" : "Account Owner Alias",
        "maxLength" : 8
      }
    },
    "label" : "Account: General",
    "labelSuffix" : "(Opportunities)"
  }, {
    "columns" : {
      "CLOSE_DATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Close Date",
        "maxLength" : null
      },
      "CLOSE_DATE2" : {
```

```
    "dataType" : "date",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : false,
    "label" : "Close Date (2)",
    "maxLength" : null
  },
  "CLOSE_MONTH" : {
    "dataType" : "date",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : false,
    "label" : "Close Month",
    "maxLength" : null
  },
  "CREATED_ALIAS" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : true,
    "label" : "Created Alias",
    "maxLength" : 8
  },
  "CREATED" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : false,
    "label" : "Created By",
    "maxLength" : null
  },
  "CREATED_DATE" : {
    "dataType" : "date",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : false,
    "label" : "Created Date",
    "maxLength" : null
  },
  "LAST_ACTIVITY" : {
    "dataType" : "date",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : false,
    "label" : "Last Activity",
    "maxLength" : null
  },
  "LAST_UPDATE_BY_ALIAS" : {
    "dataType" : "string",
    "filterValues" : [ ],
    "filterable" : true,
    "isLookup" : true,
    "label" : "Last Modified Alias",
    "maxLength" : 8
```

```
      },
      "LAST_UPDATE_BY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Last Modified By",
        "maxLength" : null
      },
      "LAST_UPDATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Last Modified Date",
        "maxLength" : null
      },
      "LAST_STAGE_CHANGE_DATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Last Stage Change Date",
        "maxLength" : null
      }
    },
    "label" : "Opportunity Information",
    "labelSuffix" : "(Opportunities)"
  }, {
    "columns" : {
      "FULL_NAME" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Opportunity Owner",
        "maxLength" : null
      },
      "OWNER_MANAGER" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Opportunity Owner: Manager",
        "maxLength" : null
      },
      "ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : true,
        "label" : "Opportunity Owner Alias",
        "maxLength" : 8
      },
```

```
      "ROLLUP_DESCRIPTION" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : true,
        "label" : "Owner Role",
        "maxLength" : 80
      }
    },
    "label" : "Opportunity Owner Information",
    "labelSuffix" : "(Opportunities)"
  } ],
  "LeadList" : [ {
    "columns" : {
      "EMAIL_BOUNCED_DATE" : {
        "dataType" : "datetime",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Email Bounced Date",
        "maxLength" : null
      }
    },
    "label" : "Lead: Ph/Fax/Email",
    "labelSuffix" : "(Leads)"
  }, {
    "columns" : {
      "CREATED_ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : true,
        "label" : "Created Alias",
        "maxLength" : 8
      },
      "CREATED_DATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Create Date",
        "maxLength" : null
      },
      "CREATED" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Created By",
        "maxLength" : null
      },
      "CREATED_MONTH" : {
        "dataType" : "date",
        "filterValues" : [ ],
```

```
        "filterable" : true,
        "isLookup" : false,
        "label" : "Created Month",
        "maxLength" : null
      },
      "LAST_ACTIVITY" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Last Activity",
        "maxLength" : null
      },
      "LAST_UPDATE" : {
        "dataType" : "date",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Last Modified",
        "maxLength" : null
      },
      "LAST_UPDATE_BY_ALIAS" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : true,
        "label" : "Last Modified Alias",
        "maxLength" : 8
      },
      "LAST_UPDATE_BY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : false,
        "label" : "Last Modified By",
        "maxLength" : null
      },
      "OWNER_ROLE_DISPLAY" : {
        "dataType" : "string",
        "filterValues" : [ ],
        "filterable" : true,
        "isLookup" : true,
        "label" : "Owner Role Display",
        "maxLength" : 80
      }
    },
    "label" : "Lead General",
    "labelSuffix" : "(Leads)"
  } ]
},
"equivalentFieldIndices" : {
  "ACCOUNT_CREATED_DATE" : 19,
  "ACCOUNT_LAST_UPDATE" : 19,
  "ACCOUNT_OWNER" : 15,
```

```
    "CREATED_ALIAS" : 16,
    "CREATED_DATE" : 19,
    "LAST_UPDATE_BY_ALIAS" : 16,
    "ALIAS" : 16,
    "EMAIL_BOUNCED_DATE" : 19,
    "CLOSE_MONTH" : 17,
    "LAST_UPDATE_BY" : 15,
    "CREATED_MONTH" : 17,
    "LAST_ACTIVITY" : 17,
    "ACCOUNT_LAST_ACTIVITY" : 17,
    "CLOSE_DATE" : 17,
    "CREATED" : 15,
    "LAST_UPDATE" : 19,
    "CLOSE_DATE2" : 17,
    "OWNER_MANAGER" : 15,
    "LAST_STAGE_CHANGE_DATE" : 19,
    "ROLLUP_DESCRIPTION" : 7,
    "FULL_NAME" : 15,
    "ACCOUNT_OWNER_ALIAS" : 16,
    "OWNER_ROLE_DISPLAY" : 7
  },
  "equivalentFields" : [ {
    "LeadList" : [ {
      "name" : "CREATED"
    }, {
      "name" : "LAST_UPDATE_BY"
    } ],
    "Opportunity" : [ {
      "name" : "CREATED"
    }, {
      "name" : "LAST_UPDATE_BY"
    }, {
      "name" : "FULL_NAME"
    }, {
      "name" : "OWNER_MANAGER"
    }, {
      "name" : "ACCOUNT_OWNER"
    } ]
  }, {
    "LeadList" : [ {
      "name" : "CREATED_ALIAS"
    }, {
      "name" : "LAST_UPDATE_BY_ALIAS"
    } ],
    "Opportunity" : [ {
      "name" : "CREATED_ALIAS"
    }, {
      "name" : "LAST_UPDATE_BY_ALIAS"
    }, {
      "name" : "ALIAS"
    }, {
      "name" : "ACCOUNT_OWNER_ALIAS"
    } ]
  }, {
```

```
  "LeadList" : [ {
    "name" : "LAST_UPDATE_BY"
  }, {
    "name" : "CREATED"
  } ],
  "Opportunity" : [ {
    "name" : "LAST_UPDATE_BY"
  }, {
    "name" : "CREATED"
  }, {
    "name" : "FULL_NAME"
  }, {
    "name" : "OWNER_MANAGER"
  }, {
    "name" : "ACCOUNT_OWNER"
  } ]
}, {
  "LeadList" : [ {
    "name" : "LAST_UPDATE_BY_ALIAS"
  }, {
    "name" : "CREATED_ALIAS"
  } ],
  "Opportunity" : [ {
    "name" : "LAST_UPDATE_BY_ALIAS"
  }, {
    "name" : "CREATED_ALIAS"
  }, {
    "name" : "ALIAS"
  }, {
    "name" : "ACCOUNT_OWNER_ALIAS"
  } ]
}, {
  "LeadList" : [ {
    "name" : "CREATED_DATE"
  }, {
    "name" : "LAST_UPDATE"
  }, {
    "name" : "EMAIL_BOUNCED_DATE"
  } ],
  "Opportunity" : [ {
    "name" : "CREATED_DATE"
  }, {
    "name" : "LAST_STAGE_CHANGE_DATE"
  }, {
    "name" : "LAST_UPDATE"
  }, {
    "name" : "ACCOUNT_CREATED_DATE"
  }, {
    "name" : "ACCOUNT_LAST_UPDATE"
  } ]
}, {
  "LeadList" : [ {
    "name" : "CREATED_MONTH"
  }, {
```

```
      "name" : "LAST_ACTIVITY"
    } ],
    "Opportunity" : [ {
      "name" : "CLOSE_DATE"
    }, {
      "name" : "CLOSE_DATE2"
    }, {
      "name" : "CLOSE_MONTH"
    }, {
      "name" : "LAST_ACTIVITY"
    }, {
      "name" : "ACCOUNT_LAST_ACTIVITY"
    } ]
  }, {
    "LeadList" : [ {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "CREATED_DATE"
    }, {
      "name" : "EMAIL_BOUNCED_DATE"
    } ],
    "Opportunity" : [ {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "LAST_STAGE_CHANGE_DATE"
    }, {
      "name" : "CREATED_DATE"
    }, {
      "name" : "ACCOUNT_CREATED_DATE"
    }, {
      "name" : "ACCOUNT_LAST_UPDATE"
    } ]
  }, {
    "LeadList" : [ {
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    } ],
    "Opportunity" : [ {
      "name" : "ROLLUP_DESCRIPTION"
    } ]
  }, {
    "LeadList" : [ {
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    }, {
      "name" : "CREATED_MONTH"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CLOSE_DATE"
    }, {
      "name" : "CLOSE_DATE2"
    }, {
      "name" : "CLOSE_MONTH"
    }, {
```

```
      "name" : "ACCOUNT_LAST_ACTIVITY"
    } ]
  }, {
    "LeadList" : [ {
      "name" : "EMAIL_BOUNCED_DATE"
    }, {
      "name" : "CREATED_DATE"
    }, {
      "name" : "LAST_UPDATE"
    } ],
    "Opportunity" : [ {
      "name" : "LAST_STAGE_CHANGE_DATE"
    }, {
      "name" : "CREATED_DATE"
    }, {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "ACCOUNT_CREATED_DATE"
    }, {
      "name" : "ACCOUNT_LAST_UPDATE"
    } ]
  }, {
    "LeadList" : [ {
      "name" : "LAST_ACTIVITY"
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      "name" : "CREATED_MONTH"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CLOSE_DATE"
    }, {
      "name" : "CLOSE_MONTH"
    }, {
      "name" : "LAST_ACTIVITY"
    }, {
      "name" : "ACCOUNT_LAST_ACTIVITY"
    } ]
  }, {
    "LeadList" : [ {
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    }, {
      "name" : "CREATED_MONTH"
    } ],
    "Opportunity" : [ {
      "name" : "CLOSE_MONTH"
    }, {
      "name" : "CLOSE_DATE"
    }, {
      "name" : "CLOSE_DATE2"
    }, {
      "name" : "LAST_ACTIVITY"
    }, {
      "name" : "ACCOUNT_LAST_ACTIVITY"
```

```
    } ]
  }, {
    "LeadList" : [ {
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    }, {
      "name" : "LAST_UPDATE_BY"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CREATED"
    }, {
      "name" : "LAST_UPDATE_BY"
    }, {
      "name" : "OWNER_MANAGER"
    }, {
      "name" : "ACCOUNT_OWNER"
    } ]
  }, {
    "LeadList" : [ {
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    }, {
      "name" : "LAST_UPDATE_BY_ALIAS"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CREATED_ALIAS"
    }, {
      "name" : "LAST_UPDATE_BY_ALIAS"
    }, {
      "name" : "ACCOUNT_OWNER_ALIAS"
    } ]
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    "LeadList" : [ {
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    }, {
      "name" : "LAST_UPDATE_BY"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CREATED"
    }, {
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    }, {
      "name" : "FULL_NAME"
    }, {
      "name" : "ACCOUNT_OWNER"
    } ]
  }, {
    "LeadList" : [ {
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    }, {
```

```
      "name" : "LAST_UPDATE_BY"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CREATED"
    }, {
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    } ]
  }, {
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    }, {
      "name" : "LAST_UPDATE_BY_ALIAS"
    } ],
    "Opportunity" : [ {
      "name" : "ACCOUNT_OWNER_ALIAS"
    }, {
      "name" : "CREATED_ALIAS"
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      "name" : "LAST_UPDATE_BY_ALIAS"
    }, {
      "name" : "ALIAS"
    } ]
  }, {
    "LeadList" : [ {
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      "name" : "CREATED_MONTH"
    } ],
    "Opportunity" : [ {
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    }, {
      "name" : "CLOSE_DATE"
    }, {
      "name" : "CLOSE_DATE2"
    }, {
      "name" : "CLOSE_MONTH"
    }, {
      "name" : "LAST_ACTIVITY"
    } ]
  }, {
    "LeadList" : [ {
      "name" : "CREATED_DATE"
    }, {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "EMAIL_BOUNCED_DATE"
    } ],
    "Opportunity" : [ {
```

```
      "name" : "ACCOUNT_CREATED_DATE"
    }, {
      "name" : "LAST_STAGE_CHANGE_DATE"
    }, {
      "name" : "CREATED_DATE"
    }, {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "ACCOUNT_LAST_UPDATE"
    } ]
  }, {
    "LeadList" : [ {
      "name" : "CREATED_DATE"
    }, {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "EMAIL_BOUNCED_DATE"
    } ],
    "Opportunity" : [ {
      "name" : "ACCOUNT_LAST_UPDATE"
    }, {
      "name" : "LAST_STAGE_CHANGE_DATE"
    }, {
      "name" : "CREATED_DATE"
    }, {
      "name" : "LAST_UPDATE"
    }, {
      "name" : "ACCOUNT_CREATED_DATE"
    } ]
  } ],
  "mergedGroups" : { }
}
```

Report Error Codes

Errors can occur at the report level. Report-level error messages are returned in the response header

When a report-level error occurs, the response header contains an HTTP response code and one of the following error messages:

HTTP Response Code	Error Message
400	The specified start date of <column name> specified for the standard date filter is invalid.
400	The specified end date of <column name> specified for the standard date filter is invalid.
400	The column <column name> specified for the standard date filter is invalid.
400	The column <column name> cannot be a standard date filter because it is not a date column.
400	The duration <value> specified for the standard date filter is invalid.
400	The report folder ID must be a valid folder ID.

HTTP Response Code	Error Message
400	The report folder ID can't be null.
400	The report name can't be null.
400	Column sorting isn't supported for matrix reports.
400	The sort column name must be from a selected column.
400	The sort column name can't be null.
400	A report can only be sorted by one column.
400	A snapshot date is not in the correct format. Accepted formats are one of the rolling dates defined or yyyy-MM-dd.
400	The request is invalid because reports that are not historical trending reports cannot have historical snapshot dates.
400	The request is invalid because there are no historical snapshot dates in the request body. Specify historical snapshot dates, or set historical snapshot dates as an empty array to omit them.
400	Only a report with fewer than 100 columns can be run. The columns are fields specified as detail columns, summaries, or custom summary formulas. Remove unneeded columns from the report and try again.
400	Can’t run the report because it doesn’t have any columns selected. Be sure to add fields as columns to the report through the user interface.
400	The request is invalid because there are no filters. Specify filters or set filters as an empty array to omit them.
400	The filter value for ID <value> is incorrect. Specify an ID that is 15 or 18 characters long, such as 006D000000CrRLw or 005U0000000Rg2CIAS.
400	Specify a valid filterable column because <value> is invalid.
400	Specify a valid condition because <value> is invalid.
400	Filter the date in the correct format. Accepted formats are yyyy-MM-dd'T'HH:mm:ss'Z' and yyyy-MM-dd.
400	The date formula is too large. Specify a reasonable value.
400	The request is invalid because there is no metadata. Specify metadata in the request body.
400	The clone request must contain a valid cloneId parameter.
403	The report can't be deleted because there are one or more dashboards referencing it.
403	You don't have permission to create reports in the given folder.
403	You don’t have permission to edit reports in the given folder.
403	The report definition is obsolete. Your administrator has disabled all reports for the custom object, or its relationships have changed.
403	You don’t have permission to run reports. Check that you have the Run Reports user permission.
403	You don’t have sufficient privileges to perform this operation.

HTTP Response Code	Error Message
403	Reports and Dashboards REST API can't process the request because it can accept only as many as <number> requests at a time to get results of reports run asynchronously.
403	Reports and Dashboards REST API can't process the request because it can accept only as many as <number> requests at a time to run reports synchronously.
403	You can't run more than <number> reports synchronously every 60 minutes. Try again later.
404	Use a valid URL, for example, /services/data/(apiversion)/analytics/reports/(reportID)/describe, to retrieve report metadata.
404	The data you're trying to access is unavailable.
410	The requested resource has been retired or removed. Delete or update any references to the resource.
415	The Reports and Dashboards REST API only supports JSON content type in both request and response bodies. Specify requests with content type as application/json.
500	We ran into an error when fetching this report's metadata. Try to re-submit your query.
500	We ran into an error when running this report. Try to re-submit your query.
500	The request body is either invalid or incomplete.
500	Results for this instance are unavailable because the report's metadata has changed from when the report was last run. To get results, run the report again or undo changes to the report's metadata.
500	The report failed to be deleted.
500	The report failed to be created.
500	The report failed to be saved.
501	You're requesting data for an unsupported report format.
501	Historical trend data is unavailable in the report format requested. Change the report format to matrix and try again.

Report Types

Use the Report Types API to get information about what report types are available in your org. The Report Types API is available in API version 39.0 and later.

Resources for the Report Types API are available at `/services/data/`***`<latest API version>`***`/analytics/report-types`. You can query each resource with an `HTTP` method.

Note: You can use either `report-types` or `reportTypes` when referring to a report type resource. The two are equivalent.

Resource	Supported HTTP Method	Description
Report Type List `/services/data/<latest API version>/analytics/report-types`	`GET`	Returns a list of available report types.
Report Type `/services/data/<latest API version>/analytics/report-types/<type>`	`GET`	Returns metadata about a specified report type.
Recently Created Reports `/services/data/<latest API version>/analytics/report-types/<report-type-API-name>/recent-reports`	`GET`	Returns a list of recently created reports for a specific report type.
Recently Used Report Types `/services/data/<latest API version>/analytics/report-types/recent/by-user`	`GET`	Returns a list of report types used by reports recently created by the current user.
Hide and Unhide Report Types `/services/data/<latest API version>/analytics/reports/show-hide-report_type`	`PATCH`	Sets the `hidden` parameter to `true` or `false` for a specific report type.

Report Type List
Return a list of report types.

Report Type
Return metadata about a report type.

Recently Used Report Types
Get the list of report types used in the 50 reports most recently created by the current user.

Recently Created Reports
Get the list of recently created reports for a particular report type for the current user or any other users.

Hide and Unhide Report Types
Update hidden state of report types (`PATCH`).

Report Type List

Return a list of report types.

Syntax

URI

`/services/data/v<XX.X>/analytics/report-types`

Formats
JSON

HTTP methods

Method	Description
`GET`	Returns a list of report types.

GET Response Body

An array of report type folder objects. Each object contains the following fields:

Property	Type	Description
`label`	String	The end user-facing name of the report type folder.
`report-types`	report-types[]	An array of report types.

report-types[]
An array of report type objects. Each object contains the following fields:

Property	Type	Description
`describeUrl`	String	A URL link to the report type's metadata.
`description`	String	Optional. A description of the report type.
`isHidden`	Boolean	Indicates whether an administrator has hidden the report type (`true`) or not (`false`). Hidden report types don't appear in the report builder when creating a report.
`isHistorical`	Boolean	Optional. `true` for historical tracking report types. If this property is missing, the value is assumed to be `false`.
`label`	String	The end user-facing name of the report type in the report builder.
`supportsJoinedFormat`	Boolean	Specifies whether a report type is compatible with joined reports (`true`) or not (`false`).
`type`	String	The API name of the report type.

Report Type

Return metadata about a report type.

Syntax

URI
`/services/data/v`***`XX.X`***`/analytics/reportTypes/`***`type`***

Formats
JSON

HTTP methods

Method	Description
`GET`	Return metadata about a report type

GET Request Body

A notification object with desired changes.

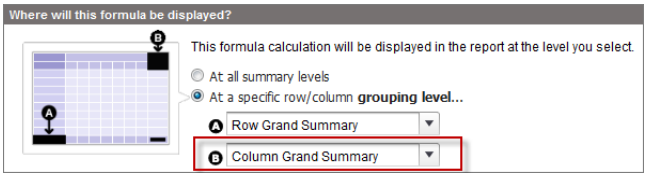
Property	Type	Description
`reportMetadata`	Report metadata	Unique identifiers for groupings and summaries.
`reportTypeMetadata`	Report type metadata	Fields in each section of a report type plus filter information for those fields.
`reportExtendedMetadata`	Report extended metadata	Additional information about summaries and groupings.

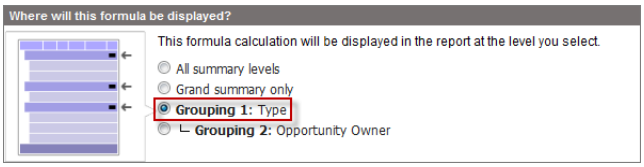
Report extended metadata

Property	Type	Description
`aggregateColumnInfo`	Aggregate column information	Includes all report summaries such as, `Record Count`, `Sum`, `Average`, `Max`, `Min`, and custom summary formulas. Contains values for each summary listed in the report metadata aggregates.
`detailColumnInfo`	Detail column information	Two properties for each field that has detailed data identified by its unique API name. The detailed data fields are also listed in the report metadata.
`groupingColumnInfo`	Grouping column information	Map of each row or column grouping to its metadata. Contains values for each grouping identified in the groupingsDown and groupingsAcross list.
`historicalColumnInfo`	Historical column information	Provides additional information on columns that exist only in historical trending reports. (This property is applicable only to historical trending reports.)

Aggregate column information

Property	Type	Description
`label`	String	Display name for record count, or the summarized or custom summary formula field.
`dataType`	String	Data type of the summarized or custom summary formula field.

Property	Type	Description
`acrossGroupingContext`	String	Column grouping in the report where the custom summary formula is displayed. As this example shows in the JSON response and in the custom summary formula editor of the matrix report, the custom summary formula is set at the grand summary level for the columns. `{ "reportExtendedMetadata" : { "aggregateColumnInfo" : { "FORMULA1" : { "label" : "Stalled Oppty Avg", "dataType" : "Percent", "acrossGroupingContext" : "GRAND_SUMMARY", "downGroupingContext" : "GRAND_SUMMARY" }, } } }` 
`downGroupingContext`	String	Row grouping in the report where the custom summary formula is displayed. In this example, the custom summary formula for a summary report is displayed at the first grouping level This example is shown in both the JSON response and in the custom summary formula editor of the summary report. `{ "reportExtendedMetadata" : { "aggregateColumnInfo" : { ...}, "FORMULA1" : { "label" : "Average Won", "dataType" : "Number", "acrossGroupingContext" : null, "downGroupingContext" : "TYPE" }, } } }`

Property	Type	Description
		

Detail column information

Property	Type	Description
`label`	String	The localized display name of a standard field, the ID of a custom field, or the API name of a bucket field that has detailed data.
`dataType`	String	The data type of the field that has detailed data. Possible values are: • `string` • `boolean` • `combobox` • `currency` • `date` • `datetime` • `double` • `email` • `html` • `id` • `int` • `multipicklist` • `number` • `percent` • `phone` • `picklist` • `reference` • `text` • `textarea` • `time` • `url`
`entityColumnName`	String	Describes the relationship between an sObject and a report field by returning the sObject and sObject field name that a report field maps to.

Property	Type	Description
		The value returned is formatted as ***sObject.sObject field***. The property is part of an object that describes a report field, such as an object in the `columns[]` array of a report type object from `reportTypeMetadata`. For example, on the `LAST_UPDATE_BY` column, the value of `entityColumnName` is `"User.Name"`, which tells us that it's mapped to the `Name` field on the `User` sObject. `"reportTypeMetadata" : { "categories" : [{ "columns" : { "LAST_UPDATE_BY" : { "allowedInCustomDetailFormula" : true, "bucketable" : true, "dataType" : "string", "entityColumnName" : "User.Name", "fieldToFieldFilterable" : false, "filterValues" : [ ], "filterable" : true, "inactiveFilterValues" : [ ], "isCustom" : false, "isLookup" : true, "label" : "Last Modified By", "maxLength" : null, "uniqueCountable" : true } } }] }`  Note: Row-level formulas aren't directly mapped to sObject fields like report fields, but they still have an `entityColumnName` property. For row-level formulas, the value of `entityColumnName` is `CDF1`.
`filterValues`	String array	All filter values for a field, if the field data type is of picklist, multi-select picklist, boolean, or checkbox. For example, checkbox fields always have a value of `True` or `False`. For fields of other data types, the filter value is an empty array because their values can't be determined. Filter values have two properties: `name`: Unique API name for a filter value. Of type string. `label`: Display name of a filter value. Of type string.
`filterable`	Boolean	`False` means that the field is of a type that can't be filtered. For example, fields of the type `Encrypted Text` can't be filtered.
`isLookup`	Boolean	Specifies whether a field is a lookup (`true`) or not (`false`).

Property	Type	Description
`label`	String	Display name of a field.
`uniqueCountable`	Boolean	Specifies whether a field supports unique count (`true`) or not (`false`)

Grouping column information

Property	Type	Description
`label`	String	Display name of the field or bucket field used for grouping.
`dataType`	String	Data type of the field used for grouping. Possible values are: • `string` • `boolean` • `combobox` • `currency` • `date` • `datetime` • `double` • `email` • `html` • `id` • `int` • `multipicklist` • `number` • `percent` • `phone` • `picklist` • `reference` • `text` • `textarea` • `time` • `url`
`groupingLevel`	Integer	Level of the grouping. Value can be: • `0`, `1`, or `2`. Indicates first, second, or third row level grouping in summary reports. • `0` or `1`. Indicates first or second row or column level grouping in a matrix report.

Historical column information

Property	Type	Description
`baseField`	String	Indicates the base column for the historical data. Example: For the historical column `Opportunity__hd.Amount__hst.N_DAYS_AGO:1`, which represents the historical `Amount` column from one day ago in an Opportunity report, the base column is `Opportunity.Amount`.
`historicalColumn`	String	The specific historical column name. Example: The historical column for `Opportunity__hd.Amount__hst.N_DAYS_AGO:1` is `Opportunity__hd.Amount__hst`.
`historicalSnapshotDate`	String	The snapshot date for this historical column. Example: For the historical column `Opportunity__hd.Amount__hst.N_DAYS_AGO:1`, the snapshot date is `N_DAYS_AGO:1, which is one day ago`.
isHistoricalChange	Boolean	`True` if the column represents change between two historical columns.

Report metadata

Property	Type	Description
`aggregates`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID. • `u!{column_name}` represents a unique count of values for the specified `{column_name}`. For example, `u!AccountName` returns the number of unique account name values in the `AccountName` field.
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field can be referenced in a row-level formula (true) or not (false).
`buckets`	Bucket field	Describes a bucket field.

Property	Type	Description
`chart`	Chart[]	Details about the chart used in a report.
`crossFilters`	Cross filter on page 291[]	Cross filters applied to the report.
`customDetailFormula`	Custom Detail Formula on page 292[]	An array of objects that describes row-level formulas.
`customSummaryFormula`	Custom summary formula	Describes a custom summary formulas.
`currency`	String	Report currency, such as USD, EUR, GBP, for an organization that has Multi-Currency enabled. Value is `null` if the organization does not have Multi-Currency enabled.
`dashboardSetting`	Name/value pair	Allows saving of dashboard settings to allow for reports with row limit filters on dashboards. Can be configured on a report for Top-N reports. The `Name` and `Value` fields in `dashboardSetting` are used as Grouping and Aggregate in dashboard components.
`detailColumns`	Array of strings	Unique API names for the fields that have detailed data.
`developerName`	String	Report API name.
`division`	String	Determines the division of records to include in the report. For example, West Coast and East Coast. Available only if your organization uses divisions to segment data and you have the "Affected by Divisions" permission. If you do not have the "Affected by Divisions" permission, your reports include records in all divisions.
`folderId`	String	ID of the folder that contains the report. Note: When the report is in the My Personal Custom Reports folder, folderId = userId. When the report is in the Unfiled Public Reports folder, folderId = orgId.
`groupingsAcross`	Groupings across[]	Unique identities for each column grouping in a report. The identity is: • An empty array for reports in summary format as it can't have column groupings. • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for a column grouping.
`groupingsDown`	Groupings down[]	Unique identities for each row grouping in a report. The identity is: • `BucketField_(ID)` for bucket fields. • ID of a custom field when the custom field is used for grouping.

Property	Type	Description
`hasDetailRows`	Boolean	Indicates whether to include detailed data with the summary data.
`hasRecordCount`	Boolean	Indicates whether the report shows the record count.
`historicalSnapshotDates`	Array of strings	List of historical snapshot dates.
`id`	String	Unique report ID.
`name`	String	Display name of the report.
`presentationOptions`	Report presentation options	Display options in the Lightning Report Builder.
`reportBooleanFilter`	String	Logic to parse custom field filters. Value is `null` when filter logic is not specified. This is an example of a report filtered to show opportunities for accounts that are either of customer or partner type OR their annual revenue exceeds 100K AND they are medium or large sized businesses. The filters are processed by the logic, "(1 OR 2) AND 3." `{ ... "reportBooleanFilter": "(1 OR 2) AND 3", "reportFilters": [ { "value": "Analyst,Integrator,Press,Other", "column": "TYPE", "operator": "notEqual" }, { "value": "100,000", "column": "SALES", "operator": "greaterThan" }, { "value": "Small", "column": "Size", "operator": "notEqual" } ] } }`
`reportFilters`	Filter details[]	List of each custom filter in the report along with the field name, filter operator, and filter value.
`reportFormat`	String	Format of the report. Possible values are: • `TABULAR` • `SUMMARY` • `MATRIX`

Property	Type	Description
		• `MULTI_BLOCK` The `MULTI_BLOCK` property is available in API version 43.0 and later.
`reportType`	Report type	Unique API name and display name for the report type. `type`: Of type string, this is the unique identifier of the report type. `label`: Of type string, this is the display name of the report type.
`scope`	String	Defines the scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`showGrandTotal`	Boolean	Indicates whether the report shows the grand total.
`showSubtotals`	Boolean	Indicates whether the report shows subtotals, such as column or row totals.
`sortBy`	Array of strings	API name of the field on which the report is sorted and the direction of the sort (asc or desc). Example: `"sortBy":[{"sortColumn":"Account_ID","sortOrder":"asc"}]`
`standardDateFilter`	Array of strings	Standard date filters available in reports. Each standard date filter contains the following properties: `column`: API name of the date field on which you filter the report data. `durationValue`: The range for which you want to run the report. The value is a date literal or 'CUSTOM.' `startDate`: Start date. `endDate`: End date.
`standardFilters`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsRoleHierarchy`	Boolean	Indicates whether the report type supports role hierarchy filtering (true) or not (false).
`topRows`	Top rows	Describes a row limit filter applied to the report.
`userOrHierarchyFilterId`	String	Unique user or role ID of the user or role used by the report's role hierarchy filter. If specified, a role hierarchy filter is applied to the report. If unspecified, no role hierarchy filter is applied to the report.

Chart

Property	Type	Description
`chartType`	String	Type of chart.
`groupings`	String	Report grouping.
`hasLegend`	Boolean	Indicates whether the report has a legend.
`showChartValues`	Boolean	Indicates whether the report shows chart values.
`summaries`	Array of strings	Unique identities for summary or custom summary formula fields in the report. For example: • `a!Amount` represents the average for the `Amount` column. • `s!Amount` represents the sum of the `Amount` column. • `m!Amount` represents the minimum value of the `Amount` column. • `x!Amount` represents the maximum value of the `Amount` column. • `s!<customfieldID>` represents the sum of a custom field column. For custom fields and custom report types, the identity is a combination of the summary type and the field ID.
`summaryAxisLocations`	String	Specifies the axis that shows the summary values. Valid values are `X` and `Y`.
`title`	String	Name of the chart.

Groupings down

Property	Type	Description
`name`	String	API name of the field used as a row grouping.
`sortOrder`	String	Order in which data is sorted within a row grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field that's used as a row grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year

Property	Type	Description
		• Calendar Month in Year • Calendar Day in Month
`sortAggregate`	String	Summary field that's used to sort data within a grouping in a report that's in summary format. Applies if you have the Aggregate Sort feature enabled as part of its pilot program. The value is null when data within a grouping is not sorted by a summary field. In this example, data grouped by Account Owner is sorted by the sum of Annual Revenue. `{ "aggregates": ["s!SALES","RowCount"], "groupingsDown": [ { "name": "USERS.NAME", "sortOrder": "Desc", "dateGranularity": "None", "sortAggregate": "s!SALES" } ] }`

Report presentation options

Property	Type	Description
`hasStackedSummaries`	Boolean	Indicates whether stacked summaries are enabled in the report.
`historicalColumns`	Historical column presentation options	Presentation options of the historical column. `"presentationOptions" : { "historicalColumns" : { "Opportunity__hd.CloseDate__hst" : { "decreaseIsPositive" : false, "showChanges" : false }, "Opportunity__hd.Amount__hst" : { "decreaseIsPositive" : false, "showChanges" : true } } }`

Historical column presentation options

Property	Type	Description
`decreaseIsPositive`	Boolean	Indicates whether a negative change (decrease in value) is displayed in green instead of red in Lightning Report Builder.
`showChanges`	Boolean	Indicates whether to display a change column for a given historical column.

Groupings across

Property	Type	Description
`name`	String	API name of the field used as a column grouping.
`sortOrder`	String	Order in which data is sorted within a column grouping. Value can be: • `asc` for ascending order. • `desc` for descending order.
`dateGranularity`	String	Interval set on a date field used as a column grouping. Value can be: • Day • Calendar Week • Calendar Month • Calendar Quarter • Calendar Year • Fiscal Quarter • Fiscal Year • Calendar Month in Year • Calendar Day in Month

Filter details

Property	Type	Description
`column`	String	Unique API name for the field that's being filtered.
`filterType`	String	Describes the type of value used to filter report data. Valid values are: • `fieldToField`—Filters report data by comparing values of one field with the values of a second field. • `fieldValue`—Filters report data by comparing values of a field with a defined value.

Property	Type	Description

		• `null`—If null, the `filterType` defaults to `fieldValue`.
		In this example, the first filter is a field-to-field filter that compares the Amount field with Projected Amount field. The second filter is a field filter that returns records for which a row-level formula returns more than 0.
		`"reportFilters" : [ {`
		`"column" : "AMOUNT",`
		`"filterType" : "fieldToField",`
		`"isRunPageEditable" : true,`
		`"operator" : "notEqual",`
		`"value" : "PROJECTED_AMOUNT"`
		`}, {`
		`"column" : "CDF1",`
		`"filterType" : "fieldValue",`
		`"isRunPageEditable" : true,`
		`"operator" : "greaterThan",`
		`"value" : "0"`
		`} ]`

`isRunPageEditable`	Boolean	Indicates if this is an editable filter in the user interface.
`operator`	String	Unique API name for the condition used to filter a field such as "greater than" or "not equal to." Filter conditions depend on the data type of the field. Valid values are: • `equals` • `notEqual` • `lessThan` • `greaterThan` • `lessOrEqual` • `greaterOrEqual` • `contains` • `notContain` • `startsWith` • `includes` • `excludes` • `within` (`DISTANCE` criteria only)
`value`	String	Value by which a field is filtered. For example, the field `Age` can be filtered by a numeric value. For datetime fields, if you make a POST request and specify a calendar date without including a time, then a default time gets included. The time defaults to midnight minus the difference between your timezone and Greenwich Mean Time (GMT). For example, if you specify 8/8/2015 and your timezone is Pacific

Property	Type	Description
		Standard Time (GMT-700), then the API returns 2015-08-08T07:00:00Z.

Bucket field

Property	Type	Description
`bucketType`	BucketType	The type of bucket. Possible values are `number`, `percent`, and `picklist`
`developerName`	String	API name of the bucket.
`label`	String	User-facing name of the bucket.
`nullTreatedAsZero`	Boolean	Specifies whether null values are converted to zero (`true`) or not (`false`).
`otherBucketLabel`	String	Name of the fields grouped as "Other" (in buckets of `BucketType` `PICKLIST`).
`sourceColumnName`	String	Name of the bucketed field.
`values`	Array of BucketTypeValues	Describes the values included in the bucket field..

Bucket field value

Property	Type	Description
`label`	String	The user-facing name of the bucket.
`sourceDimensionValues`	String	A list of the values from the source field included in this bucket category (in buckets of type `PICKLIST` and buckets of type `TEXT`).
`rangeUpperBound`	Double	The greatest range limit under which values are included in this bucket category (in buckets of type `NUMBER`).

Cross filter

Property	Type	Description
`criteria`	Array of Filter details[]	Information about how to filter the `relatedEntity`. Use to relate the primary entity with a subset of the `relatedEntity`.
`includesObject`	Boolean	Specifies whether objects returned have a relationship with the `relatedEntity` (true) or not (`false`).
`primaryEntityField`	String	The name of the object on which the cross filter is evaluated.

Property	Type	Description
relatedEntity	String	The name of the object that the `primaryEntityField` is evaluated against. (The right-hand side of the cross filter).
relatedEntityJoinField	String	The name of the field used to join the `primaryEntityField` and `relatedEntity`.

Custom Detail Formula

Property	Type	Description
`decimalPlaces`	Integer	Formats the value returned by the row-level formula. It is required for numeric return values, invalid for non-numeric return values.
`description`	String	User-defined description of the row-level formula.
`formula`	String	Specifies the formula expression to be evaluated. All report type fields, except bucketed fields and historical tracking fields can be referenced.
`formulaType`	String	Specifies the return type of the formula. Valid values include: • date • datetime • number • text
`label`	String	Specifies a name for the row-level formula.

Custom summary formula

Property	Type	Description
`label`	String	The user-facing name of the custom summary formula.
`description`	String	The user-facing description of the custom summary formula.
`formulaType`	String	The format of the numbers in the custom summary formula. Possible values are `number`, `currency`, and `percent`.
`decimalPlaces`	Integer	The number of decimal places to include in numbers.
`downGroup`	String	The name of a row grouping when the `downGroupType` is `CUSTOM`. `Null` otherwise.
`downGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.
`acrossGroup`	String	The name of a column grouping when the `accrossGroupType` is `CUSTOM`. `Null` otherwise.
`acrossGroupType`	String	Where to display the aggregate of the custom summary formula. Possible values are `all`, `custom`, and `grand_total`.

Property	Type	Description
formula	String	The operations performed on values in the custom summary formula.

Top rows

Property	Type	Description
rowLimit	Integer	The number of rows returned in the report.
direction	String	The sort order of the report rows.

Report type metadata

Property	Type	Description
categories	Categories[]	Returns all row-level formulas in a report as an object identical to the other categories objects. For row-level formulas, these properties are always false: • allowedInCustomDetailFormula • Bucketable • Filterable • isCustom • isLookup For row-level formulas, these properties are always null: • filterValues • inactiveFilterValues
dataTypeFilterOperatorMap	Filter operator reference	Lists all the possible field data types that can be used to filter the report. Each data type, such as phone, percent, currency, or picklist has two properties: name: Of type string, this is a unique API name for each field type's filter criteria. Use this API name in the metadata to define filter criteria for a report. label: Of type string, this is the display name for each filter criteria available to fields of a particular data type. For example, multipicklist fields can have for filter criteria, "equals," "not equal to," "includes," and "excludes." Bucket fields are considered to be of string data type.
dateGranularityInfos	dateGranularityInfos[]	An array of objects each of which specifies a measure of time used to group date fields (day, week, month, fiscal quarter, and more).
divisionInfo	Division info[]	Default division and list of all possible record-level divisions that can be used in a report.

Property	Type	Description
`objects`	Objects info[]	List of objects included in report type. Available in API version 54.0 and later.
`scopeInfo`	Scope info[]	Scope of the data on which you run the report. For example, you can run the report against all opportunities, opportunities you own, or opportunities your team owns. Valid values depend on the report type.
`standardDateFilterDurationGroups`	Standard date filter duration groups[]	List of standard date filters available in reports.
`standardFilterInfos`	Array of strings	List of filters that show up in the report by default. The filters vary by report type. For example, standard filters for reports on the Opportunity object are Show, Opportunity Status, and Probability. This list appears as name-value string pairs.
`supportsJoinedFormat`	Boolean	Specifies whether a report type is compatible with joined reports (`true`) or not (`false`).

Categories

Property	Type	Description
`label`	String	Display name of a section in the report type under which fields are organized. For example, in an Accounts with Contacts custom report type, `Account General` is the display name of the section that has fields on general account information.
`columns`	Column map	Information for all fields in the report type organized under a particular section's unique API name.

Column map

Property	Type	Description
`allowedInCustomDetailFormula`	Boolean	Specifies whether a field is whether a field is can be referenced in a row-level formula (`true`) or not (`false`).
`bucketable`	Boolean	Specifies whether a field can be used as the basis for a bucket column (`true`) or not (`false`).
`dataType`	String	Data type of the field.
`entityColumnName`	String	Describes the relationship between an sObject and a report field by returning the sObject and sObject field name that a report field maps to. The value returned is formatted as ***`sObject.sObject field`***. The property is part of an object that describes a report

Property	Type	Description
		field, such as an object in the `columns[]` array of a report type object from `reportTypeMetadata`. For example, on the `LAST_UPDATE_BY` column, the value of `entityColumnName` is `"User.Name"`, which tells us that it's mapped to the `Name` field on the `User` sObject. `"reportTypeMetadata" : { "categories" : [{ "columns" : { "LAST_UPDATE_BY" : { "allowedInCustomDetailFormula" : true, "bucketable" : true, "dataType" : "string", "entityColumnName" : "User.Name", "fieldToFieldFilterable" : false, "filterValues" : [ ], "filterable" : true, "inactiveFilterValues" : [ ], "isCustom" : false, "isLookup" : true, "label" : "Last Modified By", "maxLength" : null, "uniqueCountable" : true } } }] }`  Note: Row-level formulas aren't directly mapped to sObject fields like report fields, but they still have an `entityColumnName` property. For row-level formulas, the value of `entityColumnName` is `CDF1`.
`fieldToFieldFilterable`	Boolean	Specifies whether a field can be referenced in a field-to-field filter (`true`) or not (`false`).
`filterValues`	String array	All filter values for a field, if the field data type is of picklist, multi-select picklist, boolean, or checkbox. For example, checkbox fields always have a value of `True` or `False`. For fields of other data types, the filter value is an empty array because their values can't be determined. Filter values have two properties: `name`: Unique API name for a filter value. Of type string. `label`: Display name of a filter value. Of type string.
`filterable`	Boolean	`False` means that the field is of a type that can't be filtered. For example, fields of the type `Encrypted Text` can't be filtered.

Property	Type	Description
`isCustom`	Boolean	Specifies whether a column is a custom (`true`) or standard (`false`) field.
`isLookup`	Boolean	Specifies whether a field is a lookup (`true`) or not (`false`).
`label`	String	Display name of a field.
`maxLength`	Integer	Indicates the maximum permited number of characters for the value of a column field. If there is no limit, use `null`.
`uniqueCountable`	Boolean	Specifies whether a field supports unique count (`true`) or not (`false`)

`dateGranularityInfos`

Property	Type	Description
`label`	String	The name of the time measure as it appears in the application.
`value`	String	API name of the time measure.

Division Info

Property	Type	Description
`defaultValue`	String	Users are assigned a default division that applies to their newly created accounts, leads, and custom objects that are enabled for divisions.
`values`	String	All division values. Division values have two properties: `label`: Display name of a division. `name`: Unique API name of a division.

Objects Info

Property	Type	Description
`apiName`	String	API name of the object.
`joinType`	String	Present for custom report types. Indicates how the object is joined. Valid values are: • `ROOT`—Primary object • `INNER`—Inner join • `OUTER`—Outer join
`label`	String	Display name of the object.

Scope Info

Property	Type	Description
`defaultValue`	String	Default scope of the data on which you run the report.
`values`	Array of strings	All scope values. Valid values depend on the report type. Scope values have the following properties: `allowsDivision`: Allows you to segment the report by this scope. `label`: Display name of the scope. `value`: Value of the scope.

Standard date filter duration groups

Property	Type	Description
`label`	String	Display name of the standard date filter grouping. Valid values are Calendar Year, Calendar Quarter, Calendar Month, Calendar Week, Fiscal Year, Fiscal Quarter, Day and custom value based on a user-defined date range.
`standardDateFilterDurations`	Standard date filter durations[]	Details about each possible relative date filter defined under the standard date filter grouping.

Standard date filter durations

Property	Type	Description
`endDate`	String	End date of a date filter.
`label`	String	Display name of a date filter. Valid date filters are relative date filters—like `Current FY` and `Current FQ`—and custom date filters.
`startDate`	String	Start date of a date filter.
`value`	String	API name of a date filter. Valid date filters are relative date filters—like `THIS_FISCAL_YEAR` and `NEXT_FISCAL_QUARTER`—and custom date filters.

Recently Used Report Types

Get the list of report types used in the 50 reports most recently created by the current user.

Syntax

URI

`/services/data/<latest API version>/analytics/report-types/recent/by-user`

Formats

JSON

HTTP Methods

Method	Description
`GET`	Returns a list of report types used by reports recently created by the current user.

GET Response Body

The response body is a list of the report types used in reports recently created by the user.

Property	Description
`describeUrl`	A URL link to the report type's metadata.
`isCustomReportType`	Indicates whether a report type is custom (`true`) or not (`false`).
`isHidden`	Indicates whether an administrator has hidden the report type (`true`) or not (`false`). Hidden report types don't appear in the report builder when creating a report.
`isHistorical`	Indicates whether it's a historical tracking report type (`true`) or not (`false`).
`label`	The display name of the report type.
`lastUsedDate`	Timestamp when the report type was last used.
`supportsJoinedFormat`	Indicates whether a report type is compatible with joined reports (`true`) or not (`false`).
`type`	The API name of the report type.

Example:

Sample Request

```
analytics/report-types/AccountList/recent-reports?pageSize=3&isCurrentUser=true&offset=3
```

Sample Response

```
[
   {
      "createdByUser" : "Admin User",
      "createdDate" : "2021-11-03T17:31:53.000+0000",
      "id" : "00Oxx0000011ghvEAA",
      "name" : "New Accounts Report1"
   },
   {
      "createdByUser" : "Admin User",
      "createdDate" : "2021-10-19T17:20:44.000+0000",
```

```
      "id" : "00Oxx0000011gLVEAY",
      "name" : "Sample Report: # of Accounts"
   }
]
```

Recently Created Reports

Get the list of recently created reports for a particular report type for the current user or any other users.

Syntax

URI

`/services/data/`***<latest API version>***`/analytics/report-types/`***<report-type-API-name>***`/recent-reports`

Formats

JSON

HTTP Methods

Method	Description
`GET`	Returns a list of recently created reports for a specific report type.

Parameters

Parameter	Description
`pageSize`	`Integer` Required for `GET` calls. Specifies number of recently created reports to return.
`isCurrentUser`	`Boolean` Optional for `GET` calls. Specifies if results are limited to current user (`true`) or all other users (`false`). Default value is `false`.
`offset`	`Integer` Optional for `GET` calls. Specifies offset of returned report list. Default value is `0`.

GET Response Body

The response body is a list of the recently created reports for the report type.

Property	Description
`createdByUser`	Name of user who created report.
`createdDate`	Timestamp of report creation.

Property	Description
`id`	Id of report.
`name`	Name of report.

Example:

Sample Request

```
analytics/report-types/AccountList/recent-reports?pageSize=3&isCurrentUser=true&offset=3
```

Sample Response

```
[
   {
      "createdByUser" : "Admin User",
      "createdDate" : "2021-11-03T17:31:53.000+0000",
      "id" : "00Oxx0000011ghvEAA",
      "name" : "New Accounts Report1"
   },
   {
      "createdByUser" : "Admin User",
      "createdDate" : "2021-10-19T17:20:44.000+0000",
      "id" : "00Oxx0000011gLVEAY",
      "name" : "Sample Report: # of Accounts"
   }
]
```

Hide and Unhide Report Types

Update hidden state of report types (`PATCH`).

Syntax

URI

`/services/data/<latest API version>/analytics/reports/show-hide-report_type`

Formats

JSON

HTTP Methods

Method	Description
`PATCH`	Sets the `hidden` parameter to `true` or `false` for a specific report type.

Parameters

Parameter	Description
`templateId`	Required for `PATCH` calls. Specifies report type API name.

Parameter	Description
`hidden`	Required for `PATCH` calls. Specifies if report type is hidden (`true`) or not (`false`).

Example:

Sample Request Body

Hide a report type

```
{
   "templateId" : <Report Type API Name>,
   "hidden" : "true"
}
```

Show a report type

```
{
   "templateId" : <Report Type API Name>,
   "hidden" : "false"
}
```

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