

How to create a report in Salesforce

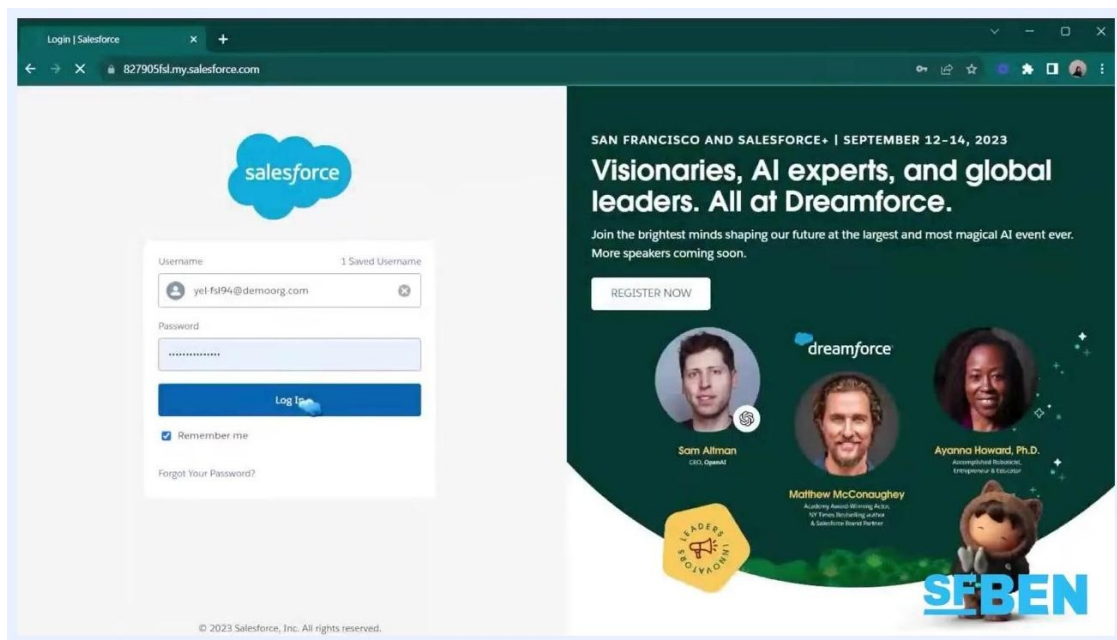
Salesforce reports help you turn raw organizational data into insights you can act on. This guide walks you through how to create a report in Salesforce, from accessing the Reports tab to adding filters, columns, grouping, charts, and organizing your finished reports into shared folders.

Prerequisites

- An active Salesforce account with login credentials.
- Access to the standard or custom report types you plan to use (for example, Accounts).

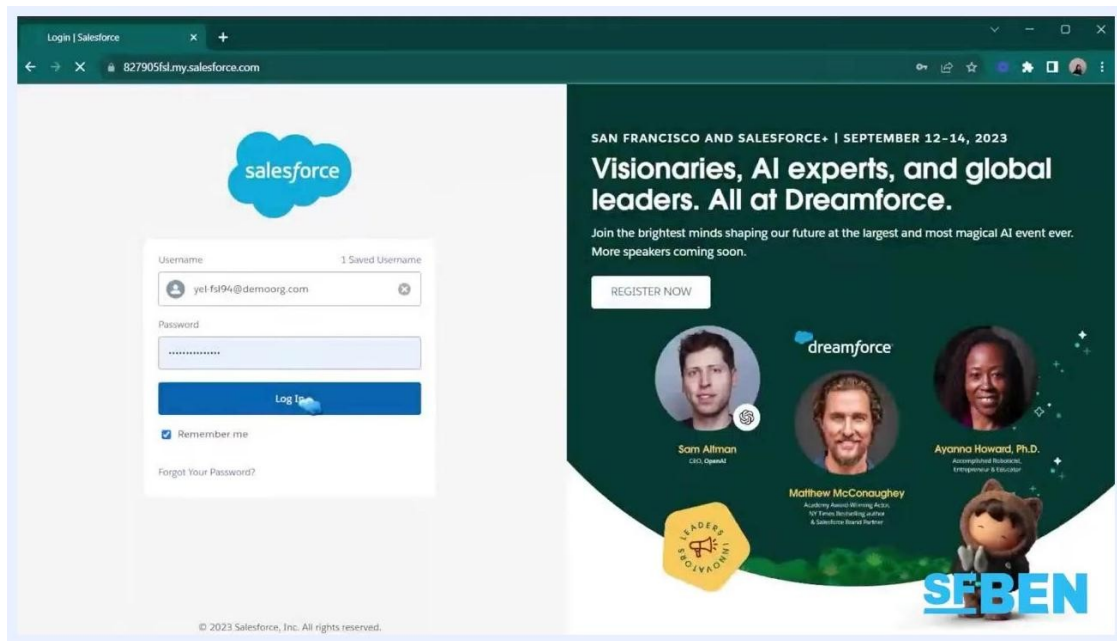
Step 1: Access the Reports tab

Log in to your Salesforce account using your username and password.



Salesforce login screen with username and password fields, "Log In" button, and Dreamforce event banner

Locate the Reports tab in the main navigation menu at the top of the screen. If you don't see it, click the nine-dot grid icon (App Launcher) in the upper left corner, type "Reports" in the search bar, and select it from the results.



Salesforce home screen with the App Launcher open, a search bar, and a list of available apps

Step 2: Start a new report

On the Reports page, click the New Report button to begin creating a new report.

Step 3: Choose a report type

In the Create Report dialog, browse or search for the report type that matches the data you want to analyze. If you have custom report types, select the one that fits your needs. For this example, select the standard Accounts report type.

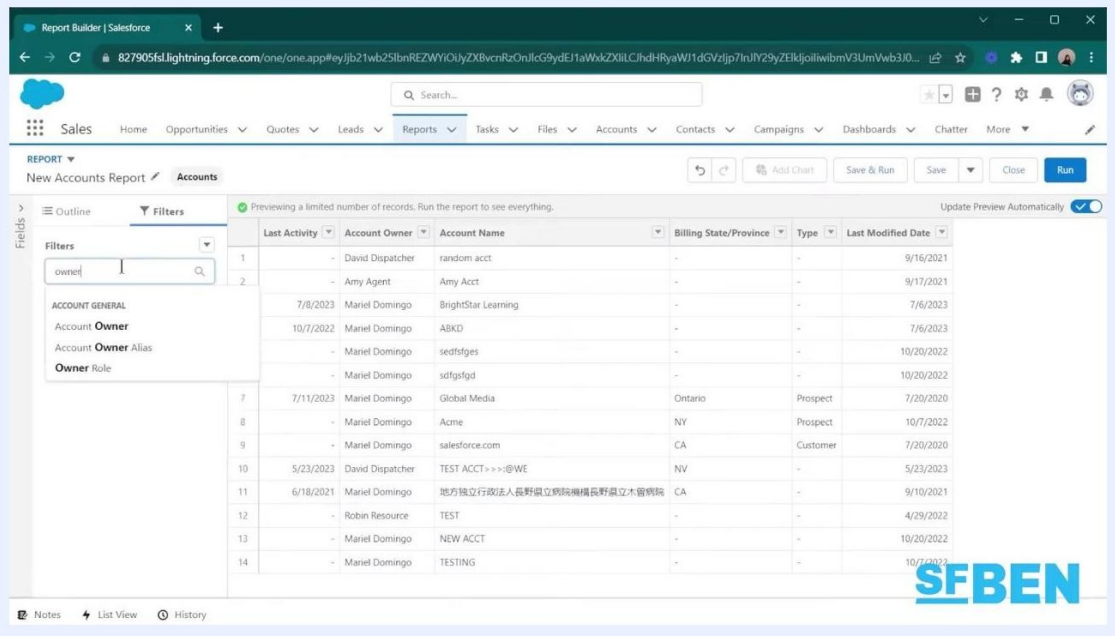
The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Quotes', 'Leads', 'Reports', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Chatter', and 'More'. The 'Reports' tab is active, and the 'Accounts' report type is selected. The left sidebar shows the 'Filters' section with a search bar containing 'owner'. Below the search bar, the 'ACCOUNT GENERAL' section is expanded, showing 'Account Owner', 'Account Owner Alias', and 'Owner Role'. The main area displays a table of account records with columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, and Last Modified Date. The table contains 14 rows of data. At the bottom right, there is a blue 'SF BEN' logo.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Last Modified Date
1	-	David Dispatcher	random acct	-	-	9/16/2021
2	-	Amy Agent	Amy Acct	-	-	9/17/2021
	7/8/2023	Marcel Domingo	BrightStar Learning	-	-	7/6/2023
	10/7/2022	Marcel Domingo	ABKD	-	-	7/6/2023
	-	Marcel Domingo	sedstfges	-	-	10/20/2022
	-	Marcel Domingo	sdfgrfgd	-	-	10/20/2022
7	7/11/2023	Marcel Domingo	Global Media	Ontario	Prospect	7/20/2020
8	-	Marcel Domingo	Acme	NY	Prospect	10/7/2022
9	-	Marcel Domingo	salesforce.com	CA	Customer	7/20/2020
10	5/23/2023	David Dispatcher	TEST ACCT>>>@WE	NV	-	5/23/2023
11	6/18/2021	Marcel Domingo	地方独立行政法人長野県立病院機構長野県立木曽病院	CA	-	9/10/2021
12	-	Robin Resource	TEST	-	-	4/29/2022
13	-	Marcel Domingo	NEW ACCT	-	-	10/20/2022
14	-	Marcel Domingo	TESTING	-	-	10/20/2022

Salesforce "Create Report" dialog with the "Accounts" report type selected under Recently Used

Step 4: Add filters to narrow down data

After selecting your report type, use the Filters section to refine your data. Click the Add filter field, then choose the field you want to filter by, such as Date, Owner, or another relevant criterion. For example, type "owner" in the filter search box and select Account Owner to filter by owner.



The screenshot shows the Salesforce Report Builder interface. The 'Filters' tab is active, and the 'owner' filter is applied to the 'Account Owner' field. The report preview shows a list of accounts with columns for Last Activity, Account Owner, Account Name, Billing State/Province, Type, and Last Modified Date. The 'owner' filter is applied to the 'Account Owner' field, and the report preview shows a list of accounts with columns for Last Activity, Account Owner, Account Name, Billing State/Province, Type, and Last Modified Date.

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Last Modified Date
1	- David Dispatcher	random acct	-	-	9/16/2021
2	- Amy Agent	Amy Acct	-	-	9/17/2021
7/8/2023	Marcel Domingo	BrightStar Learning	-	-	7/6/2023
10/7/2022	Marcel Domingo	ABKD	-	-	7/6/2023
-	Marcel Domingo	sedstfges	-	-	10/20/2022
-	Marcel Domingo	sdftsgfd	-	-	10/20/2022
7/11/2023	Marcel Domingo	Global Media	Ontario	Prospect	7/20/2020
-	Marcel Domingo	Acme	NY	Prospect	10/7/2022
-	Marcel Domingo	salesforce.com	CA	Customer	7/20/2020
5/23/2023	David Dispatcher	TEST ACCT >>>@WE	NV	-	5/23/2023
6/18/2021	Marcel Domingo	地方独立行政法人長野県立病院機構長野県立木曽病院	CA	-	9/10/2021
-	Robin Resource	TEST	-	-	4/29/2022
-	Marcel Domingo	NEW ACCT	-	-	10/20/2022
-	Marcel Domingo	TESTING	-	-	10/20/2022

Salesforce Report Builder with the Filters tab active, the "Add filter" field, and "owner" being typed into the filter search box

You can enable Update Preview Automatically (toggle in the upper right) to see changes reflected in real time as you adjust filters.

Step 5: Preview and adjust your report

Review the data preview to confirm your filters are applied correctly. Continue adding or adjusting filters as needed to focus on the most relevant data for your analysis.

Step 6: Add columns to your report

In the Report Builder, locate the Columns section on the left sidebar. Click the Add column... field and type the name of the field you want to add, such as "phone," then select Phone from the dropdown list.

The screenshot shows the Salesforce Report Builder interface for a report titled "New Accounts Report" under the "Accounts" group. The left sidebar shows the "Columns" section with a search bar and a list of available fields: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Last Modified Date, and Phone. The "Phone" field is highlighted. The main area displays a preview of the report results with 10 rows. The columns in the preview are: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Last Modified Date, and Phone. The "Phone" column is visible on the far right of the preview.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Last Modified Date	Phone
1	7/8/2023	Mariel Domingo	BrightStar Learning	-	-	7/6/2023	-
2	10/7/2022	Mariel Domingo	ABKD	-	-	7/6/2023	-
3	-	Mariel Domingo	NEW ACCT	-	-	10/20/2022	-
4	-	Mariel Domingo	sedstfges	-	-	10/20/2022	-
5	-	Mariel Domingo	sdftsfpd	-	-	10/20/2022	-
6	-	Mariel Domingo	TESTING	-	-	10/7/2022	-
7	7/11/2023	Mariel Domingo	Global Media	Ontario	Prospect	7/20/2020	(905) 555-1212
8	-	Mariel Domingo	Acme	NY	Prospect	10/7/2022	(212) 555-5555
9	-	Mariel Domingo	salesforce.com	CA	Customer	7/20/2020	(415) 901-7000
10	6/18/2021	Mariel Domingo	地方独立行政法人民野景立病院	CA	-	9/10/2021	-

Salesforce Report Builder with "Phone" being added as a column, visible in the Columns section and report preview

The new column appears on the far right of your report results. To remove a column, click the X next to its name in the Columns list. For example, you can add the Phone column and remove the Last Activity column.

Step 7: Group data for summaries and trends

To group your data, find the Group Rows section on the left sidebar. Click the Add group... search box, then type and select the field you want to group by, such as "Type."

The screenshot shows the Salesforce Report Builder interface. The report is titled "New Accounts Report" and is currently in "Preview" mode. The data is grouped by "Type" into three categories: Customer (3), Prospect (4), and Reseller (3). Each group has a "Subtotal" row. The columns displayed are: Account Owner, Account Name, Billing State/Province, Last Modified Date, and Phone. The interface includes a left sidebar with "Groups" and "Columns" sections, and a top navigation bar with various Salesforce menu items. A watermark "SFBEN" is visible in the bottom right corner of the report preview area.

Type	Account Owner	Account Name	Billing State/Province	Last Modified Date	Phone
Customer (3)	Marcel Domingo	sestsfes	-	9/2/2023	-
	Marcel Domingo	sdfstfgd	-	9/2/2023	-
	Marcel Domingo	salesforce.com	CA	7/20/2020	(415) 901-7000
Subtotal					
Prospect (4)	Marcel Domingo	BrightStar Learning	-	9/2/2023	-
	Marcel Domingo	Global Media	Ontario	7/20/2020	(905) 555-1212
	Marcel Domingo	Acme	NY	10/7/2022	(212) 555-5555
	Marcel Domingo	地方独立行政法人長野県立病院機構長野県立木曽病院	CA	9/2/2023	-
Subtotal					
Reseller (3)	Marcel Domingo	ABKD	-	9/2/2023	-
	Marcel Domingo	NEW ACCT	-	9/2/2023	-
	Marcel Domingo	TESTING	-	9/2/2023	-
Subtotal					
Total (10)					

Salesforce Report Builder with data grouped by "Type," showing Customer, Prospect, and Reseller sections with subtotals

The report now displays grouped rows, such as by Account Type (Customer, Prospect, Reseller), with subtotals for each group.

Step 8: Run the report

After setting up your filters, columns, and grouping, click the blue Run button in the upper right corner. The report generates and displays data based on your current settings.

The screenshot shows the Salesforce Report Builder interface. The report is titled 'New Accounts Report' and is categorized under 'Accounts'. The interface includes a search bar, navigation tabs (Sales, Home, Opportunities, Quotes, Leads, Reports, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Chatter, More), and a 'Run' button in the top right corner. The report is displayed in a table format with columns: Type, Account Owner, Account Name, Billing State/Province, Last Modified Date, and Phone. The data is grouped by 'Type' (Customer, Prospect, Reseller) and 'Account Owner' (Mariel Domingo). The report includes subtotals for each group. At the bottom, there are toggles for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently enabled. A watermark 'SFBEN' is visible in the bottom right corner.

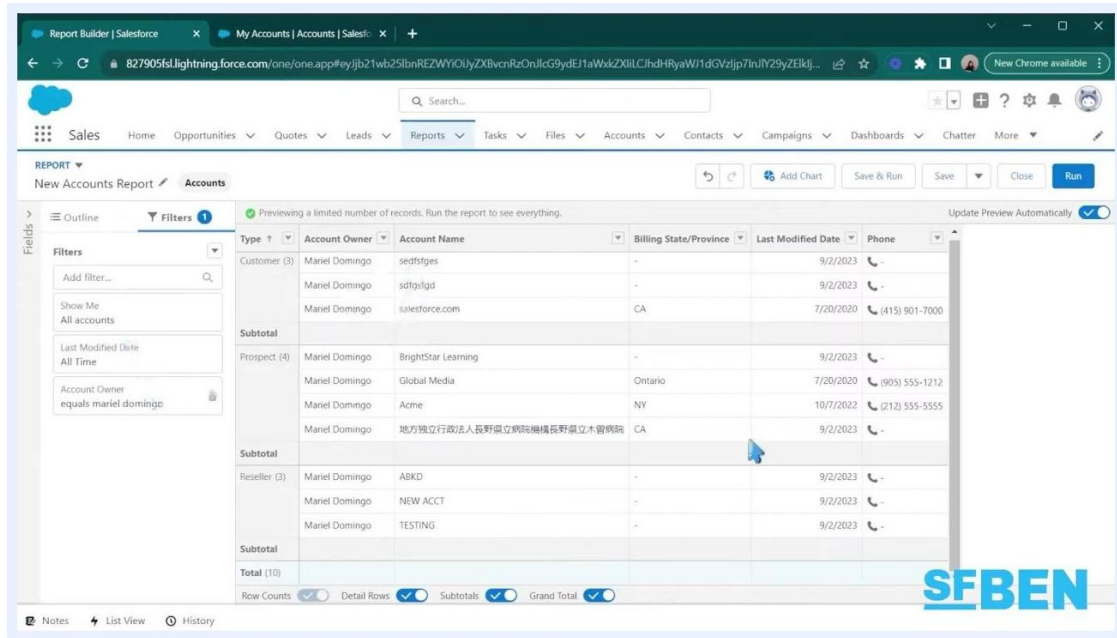
Type	Account Owner	Account Name	Billing State/Province	Last Modified Date	Phone
Customer (3)	Mariel Domingo	sedstfges	-	9/2/2023	-
	Mariel Domingo	sdtylglgd	-	9/2/2023	-
	Mariel Domingo	salesforce.com	CA	7/20/2020	(415) 901-7000
Subtotal					
Prospect (4)	Mariel Domingo	BrightStar Learning	-	9/2/2023	-
	Mariel Domingo	Global Media	Ontario	7/20/2020	(905) 555-1212
	Mariel Domingo	Acme	NY	10/7/2022	(212) 555-5555
	Mariel Domingo	地方独立行政法人長野県立病院機構長野県立木曽病院	CA	9/2/2023	-
Subtotal					
Reseller (3)	Mariel Domingo	ABKD	-	9/2/2023	-
	Mariel Domingo	NEW ACCT	-	9/2/2023	-
	Mariel Domingo	TESTING	-	9/2/2023	-
Subtotal					
Total (10)					

Salesforce report with grouped data, applied filters, and toggles for Detail Rows, Subtotals, and Grand Total enabled

Running the report does not save it—use this feature to preview and verify your setup. At the bottom of the report, use the toggles to show or hide Detail Rows, Subtotals, and Grand Total as needed.

Step 9: Add a chart to visualize your data

To add a chart or graph, click the Add Chart button above the report preview and choose the chart type that best visualizes your data, such as a bar chart.

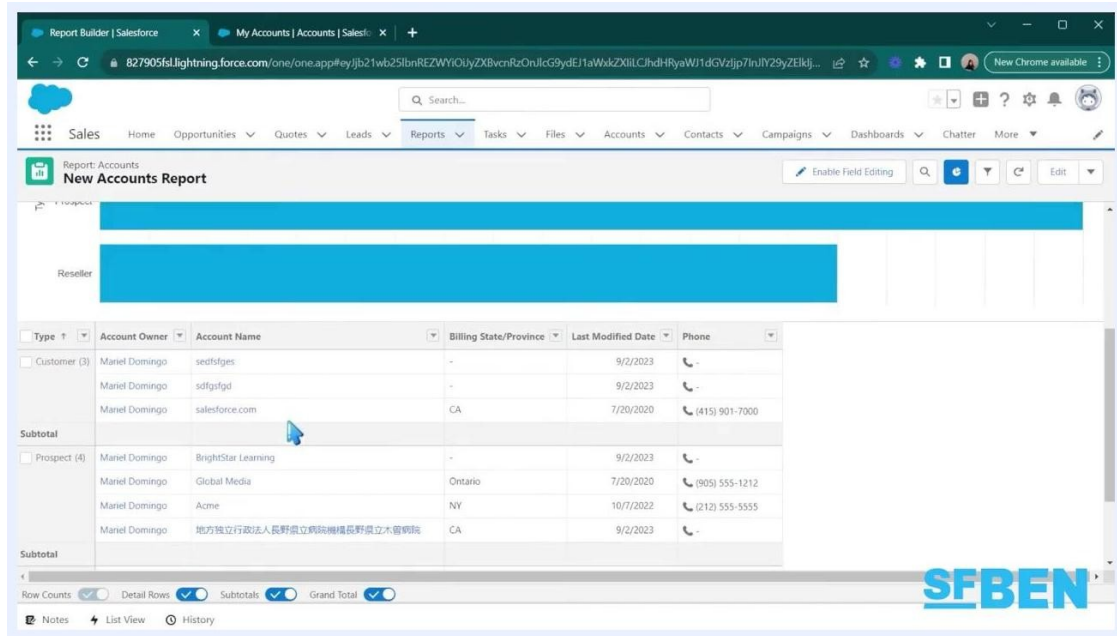


Salesforce report with a bar chart showing record counts for Customer, Prospect, and Reseller account types

For example, you can add a bar chart to display Account Type and its record count. You can toggle the chart display, add more filters, or change the chart type as needed.

Step 10: Review and export your visualization

Review the chart to confirm it accurately represents your grouped data. The chart displays each Account Type (Customer, Prospect, Reseller) along with the number of records for each.



Salesforce report with a bar chart visualizing account types and record counts, with the export option visible

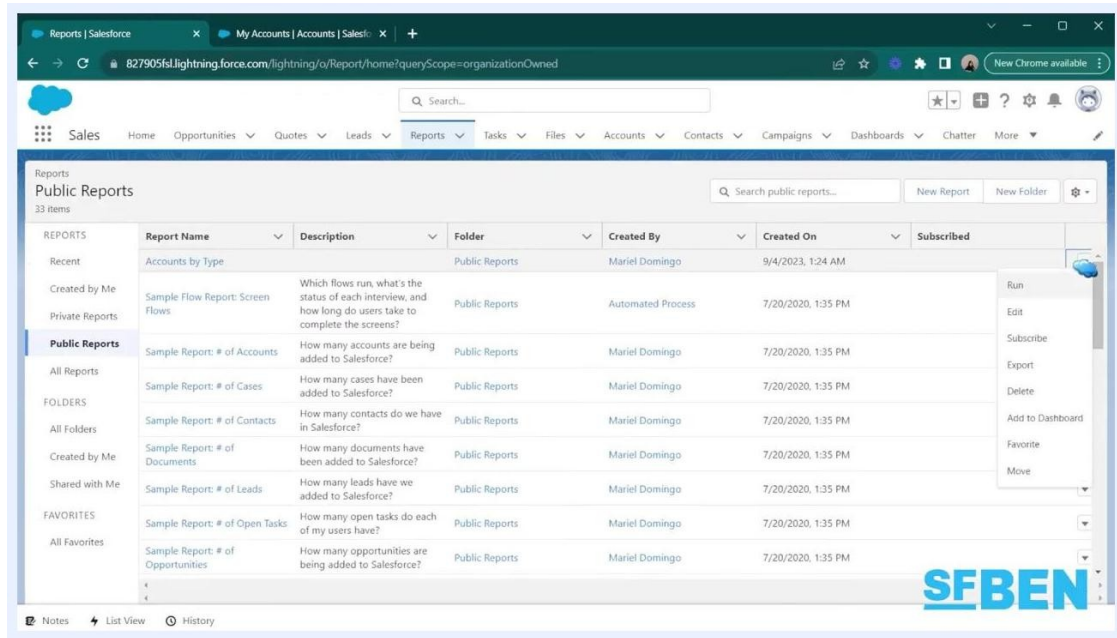
To export the report or chart, click the dropdown arrow next to the Edit button and select Export.

Step 11: Save your report

Once you're satisfied with your report, click the Save button. Enter a report name and choose the folder where you want to save it, such as Public Reports. Share the report with your team or organization as needed.

Step 12: Create a folder to organize your report

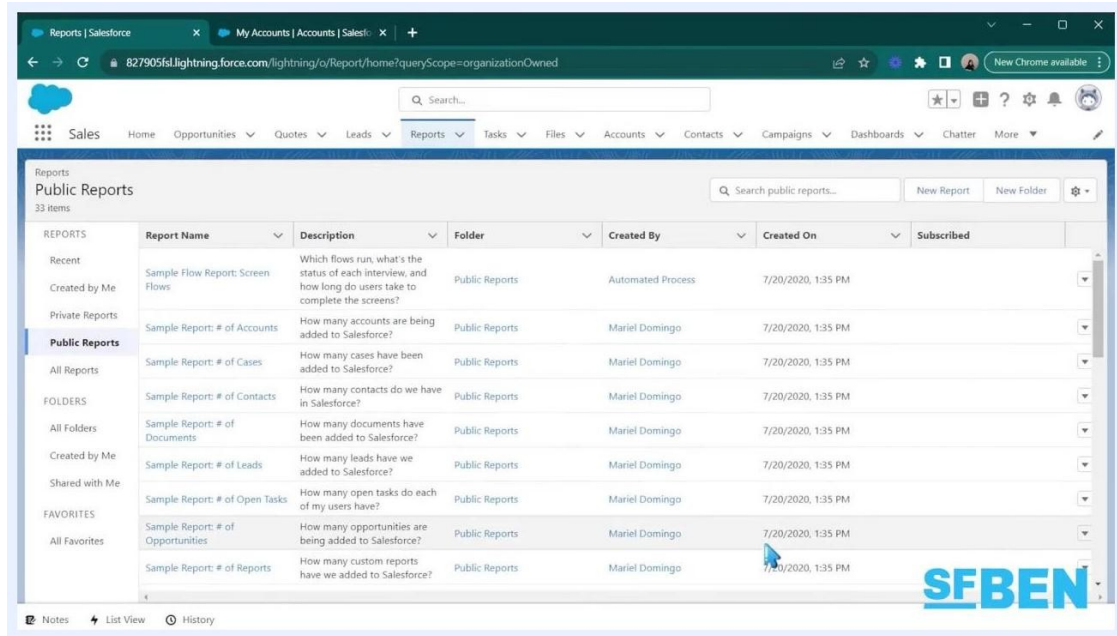
In the Reports section, click the New Folder button at the top right of the report list, then enter a folder name such as "Account Reports" and confirm creation.



Salesforce Reports screen showing the "Public Reports" list, with options to create a new folder and manage reports

This folder helps you organize related reports and manage sharing settings. For example, you can create a folder named "Account Reports" for storing account-related reports.

Locate your report, such as "Accounts by Type," in the report list. Use the dropdown menu next to the report name and select Move, then choose the "Account Reports" folder as the destination.

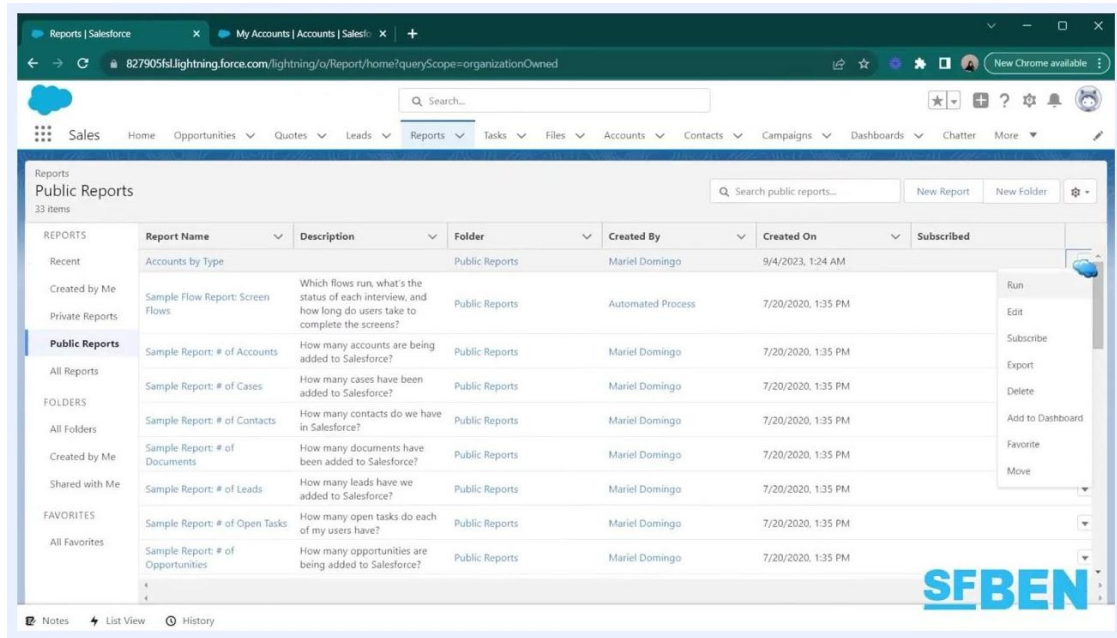


Salesforce Reports screen showing the "Accounts by Type" report during the process of moving it to a new folder

Confirm the move to organize your report within the new folder.

Step 14: Manage sharing settings for the folder

Navigate to the "Account Reports" folder under All Folders and select it to view its contents. Click the sharing or settings icon to manage access.



Salesforce "All Folders" view showing the "Account Reports" folder with the "Accounts by Type" report inside

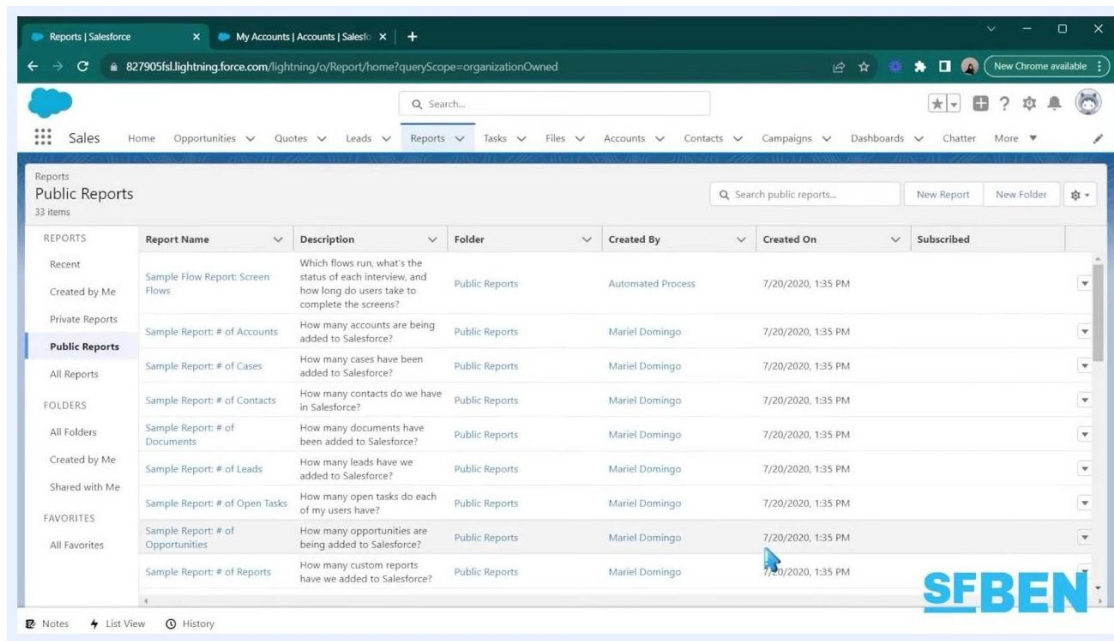
Share the folder with specific users or groups and set an access level for each:

- View: Users can only view reports in the folder.
- Edit: Users can view and edit reports in the folder.
- Manage: Users can view, edit, and manage sharing for the folder.

For example, you can share "Account Reports" with your team and grant Edit access to team leads.

Step 15: Review your final report

Open the "Accounts by Type" report from the "Account Reports" folder and review the grouped data, columns, and any visualizations you've added.



Salesforce report "Accounts by Type" open, showing grouped data, columns, and summary toggles enabled

Confirm that details such as Account Owner, Account Name, Billing State/Province, Last Modified Date, and Phone are correct, and that subtotals and grand totals display as needed.

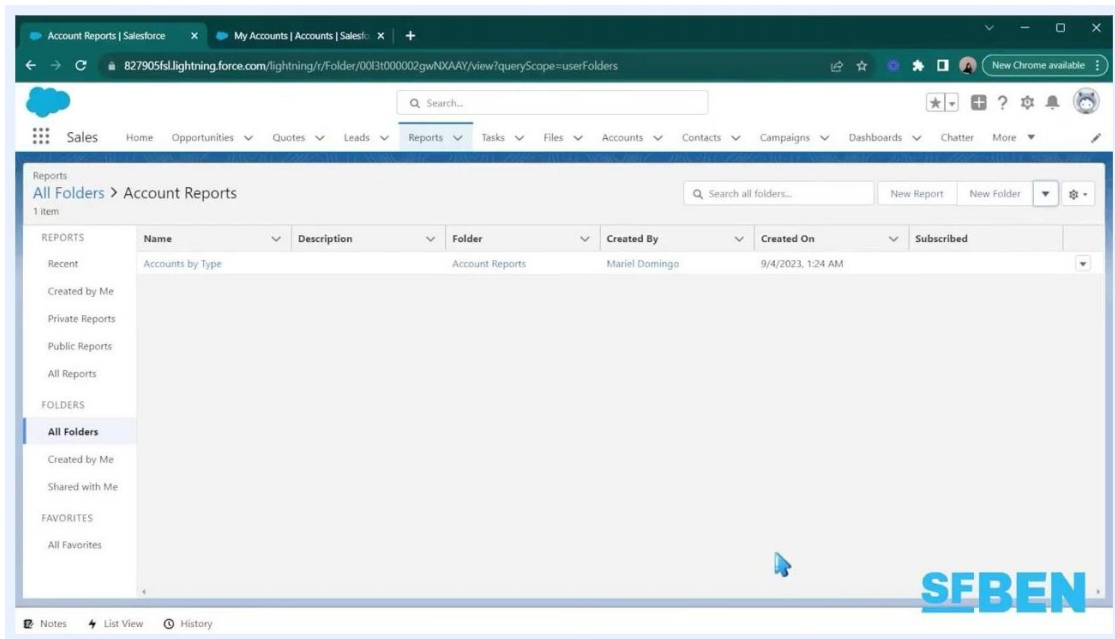
Summary

You now know how to create a report in Salesforce: accessing the Reports tab, selecting a report type, applying filters, adding columns, grouping data, running the report, adding charts, and saving and organizing it into shared folders. These steps let you visualize and analyze your organization's data effectively while keeping your reports accessible and secure for your team.

What's next

- Experiment with different report types and visualizations to find the best fit for your data analysis needs.
- Use additional charts, graphs, and filters to uncover deeper insights.

- Refine your folder organization and sharing settings to streamline collaboration across your team.



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