List Views vs Reports
Salesforce provides many options to view and access data. List Views and Reports both provide the ability to filter and sort data. However, there are scenarios when you may prefer to use one over the other. Generally speaking, a List View is used to quickly segment, and then take action on records. A Report is used to summarize record data for analysis. The following table provides a side-by-side comparison of the functionality available for List Views and Reports:

List Views vs. Reports Comparison
When should I use a List View versus a report?

<table>
<thead>
<tr>
<th>Functionality</th>
<th>List Views</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-line editing</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Take Immediate Action</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Group, summarize, or calculate</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Schedule to run automatically</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Export to Excel</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>View over 2,000 records</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Combine multiple objects in one view</td>
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<td>X</td>
</tr>
</tbody>
</table>

List Views

Overview of List Views
- Basic filtered views of records
- Quickly segment data
- View information from a single object
- Ability to use in-line editing for mass edits

What you CAN do with List Views
- Allows users to create views specific to them
- Can filter and “report” on data while viewing data on an object
- Use the List View results to mass edit records - such as following multiple records and editing data on multiple records
- Group, summarize, and perform calculations of data (analysis)
- Schedule a report to run and send via email
- Easily export information out to Excel
● Contact list view results can be added to Campaigns

**What you CAN’T do with List Views:**
● Cannot export data
● Data limited to a single object

**Where to find & edit List Views:**
● Go to Case Object
● Locate the “Recently Viewed” view
● Use the down arrow to see other List Views
● Scroll down to My Cases
● Use the gear wheel and scroll down to Edit List Views
Reports

Overview of Reports
- Used to summarize, calculate, and analyze data
- Combines data from multiple records
- Standard and Custom Reports
- 4 standard report types: Tabular, Summary, Matrix, or Joined
- Export to Excel or Copy

What you CAN do with Reports:
- Can view data across objects - such as Contacts with a set of Interest Areas and/or Geographies
- Ability to summarize data - such as Activity/Task data (Open for a specific user, All Closed for a time period, etc.)
- You would like to edit one or more records at once (quickly segment data and take action)
- Contact reports results can be added to Campaigns

What you CAN’T do with Reports:
- Joined reports cannot be exported to Excel
- Complex Salesforce architecture and configuration may limit many objects can be seen on a single report

Where to find Reports: