

Advanced Report Filtering

Filter Logic

By default, multiple filters on a report are combined with AND, meaning a record must match every filter to appear. Salesforce reporting provides more flexibility in report creation by allowing you to specify and give priority to certain filters using **Filter Logic**. This feature lets you control how filters combine, using AND, OR, and NOT, including parentheses for grouping

Adding Filter Logic

After you start making a report of any object type, you can add filters to the report on the filter tab. Once at least two filters are added, the filter logic menu appears at the top right of the left panel to select filter logic.

Add filter...

Show Me
All opportunities

Close Date
Current FQ (Jul 1, 2026 - Sep 30, 2026)

Opportunity Status
Any

Probability
All

Add Filter Logic

Add Cross Filter

Add Row Limit

at the top right of the left panel to select filter logic.

Edit Filter Logic

1 AND 2

Cancel

Apply

Filter Logic Formulas

Once the filter logic menu is open you will see that the default value of "1 AND 2" will be shown. (If you have more filters those would be listed with AND as well). This is the logic that is usually applied in reporting, where all filters must apply to the record for it to be included in the report. Each added filter is automatically assigned a number based on order added, this can be grouped in the formula using parentheses.

Accepted terms: AND, OR, NOT

Example	Record will show when:
1 AND 2	Both filter 1 and 2 apply.
1 OR 2	Either filter 1, filter 2, or both apply.
NOT(1)	Filter 1 does not apply.

Cross Filters

Cross filter is another feature of salesforce reporting that allows you to filter a report based on the presence or absence of related child records. Unlike a standard filter, a Cross Filter does not let you display fields from the child object on the report, it only has the ability to determine whether the parent record qualifies.

Examples:

1. Show accounts with attached opportunities
2. Show accounts without contacts

Adding a Cross Filter

After you start making a report of any object type, you can add a cross filter by switching to the filters tab and using the dropdown menu to select "Add Cross Filter". This will open a menu allowing you to specify if you want to show records with or without a secondary object attached.

Filters

Add filter...

Show Me
All opportunities

Close Date
Current FQ (Jul 1, 2026 - Sep 30, 2026)

Opportunity Status
Any

Probability
All

Add Filter Logic

Add Cross Filter

Add Row Limit

Edit Filter

Show Me

Opportunities

with

Secondary Object

Action Plans

Cancel

Apply

After applying the cross filter and running the report, you should see that the records not matching your cross filter are no longer appearing.

Lock Filters

If you are planning on sharing a record with others, a useful security feature provided by salesforce is the ability to lock filters. Normally, anyone viewing a report can change the filter values on the run page, this can be prevented on more essential reports by simply checking the locked checkbox

How to Lock a Filter

Click the filter you want to lock to edit it (same menu is accessed when creating new filter), and in the bottom left you simply check the "Locked" checkbox. Afterwards just hit apply and your changes will be saved preventing anyone from editing the filter on the run reports page.

Filter By

X

Field

Stage

X

Operator

equals

Value

Q

All

Discovery

Qualification

Cultivation

Solicitation

✓

Locked

i

Cancel

Apply

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