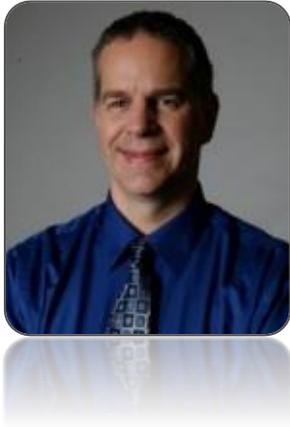


#HowToTuesday [11] - How to Calculate % of Accounts with Activities as % of Total Accounts

This edition of #HowToTuesday has been brought to you by:



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Setting the scene

Ever needed to show the number of Accounts that have activities vs. those don't and want to show it as a percentage? How about Accounts with Opportunities as a percentage of all accounts. Or even Custom Object A that has Custom Object B compared to all Custom Object A?

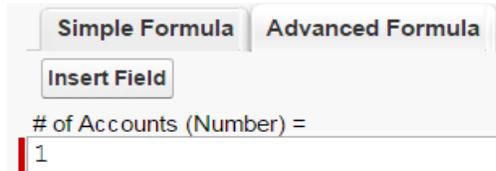
Well this is all very doable within standard Salesforce reporting with just a few configurations. We will use Accounts with Activities as our example but it should work for any of the scenarios mentioned above.

“Now why would you want to do something like this?”, you say. Well I am glad you asked. This can be used to show many things.

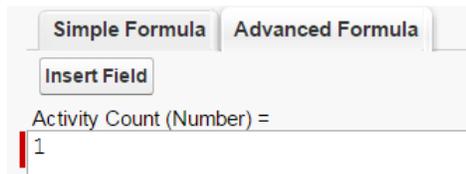
- Sales reps effectiveness in targeting high dollar accounts vs. low dollar accounts
- Where is person spending most of their time and effort
- How often is Object B associated to Object A

What you will need to configure

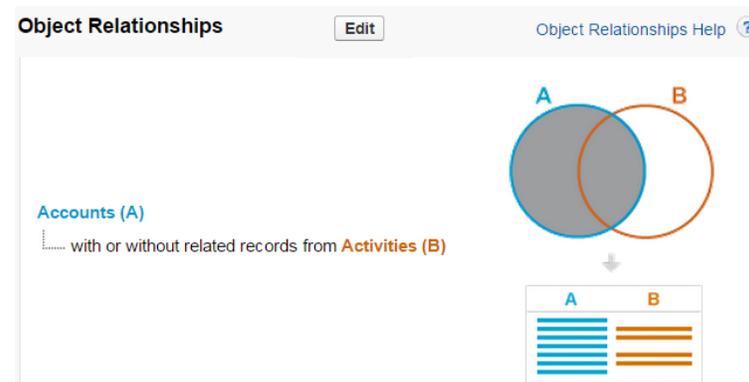
1. Add a **custom formula field** on the Account object and set the formula to equal 1
We will name this field '# of Accounts' (API name Number_of_Accounts__c)



2. Add a **custom formula field** on the Activities object and set the formula to equal 1
We will name this field Activity Count (API name Activity_Count__c)



3. Create a custom report type for **Accounts with and without Activities**



What you will need to configure

4. Next you will need to create a report based on the report type you created in step C) and to get the % calculation you will enter the following formula:

$$\frac{\left(\text{Account.Number_of_Accounts_c:SUM} - (\text{RowCount} - \text{Activity.Activity_Count_c:SUM}) \right)}{\text{Account.Number_of_Accounts_c:SUM}}$$

Let's break down how the formula works

- Account.Number_of_Accounts__c:SUM** shows the count of the main object in the with or without report type; in this case it is the Account object.
- RowCount** is the total number of records that are displayed in the report
- Activity.Activity_Count__c:SUM** shows the count of the related object in the with or without report type; in this case it is the Activities object.
- RowCount - Activity.Activity_Count__c:SUM** this formula shows the number of the main object (Accounts) that **DO NOT** have any sub objects (Activities) associated with them.
- (Account.Number_of_Accounts__c:SUM - (RowCount - Activity.Activity_Count__c:SUM))** this formula will give you the number of the main object (Accounts) that **DO** have a sub object (Activities) associated with them.
- By dividing the formula in e. by **Account.Number_of_Accounts__c:SUM** you then get the percentage of the main object (Accounts) that have a sub object (Activities) associated with them.

The Result

Here is what a report would look like with all the fields. You can remove all but the % field to clean it up but this was done to show all the values noted in Point 4 above.

		Revenue Band				Grand Total
Account Owner: Full Name		<500,000	500,000 to 1,000,000	1,000,000 to 5,000,000	5,000,000+	
Kevin Edlmann	Sum of # of Accounts	2	3	4	6	15
	# of Activities	0	5	3	7	15
	# of Accounts without Activities	2	2	1	4	9
	% of Accounts with Activities	0.00%	66.67%	75.00%	50.00%	53.33%
	Record Count	2	7	4	11	24
Grand Total	Sum of # of Accounts	2	3	4	6	15
	# of Activities	0	5	3	7	15
	# of Accounts without Activities	2	2	1	4	9
	% of Accounts with Activities	0.00%	66.67%	75.00%	50.00%	53.33%
	Record Count	2	7	4	11	24

Thank You

The Salesforce logo, which consists of a blue cloud shape with the word "salesforce" written inside in white lowercase letters.

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