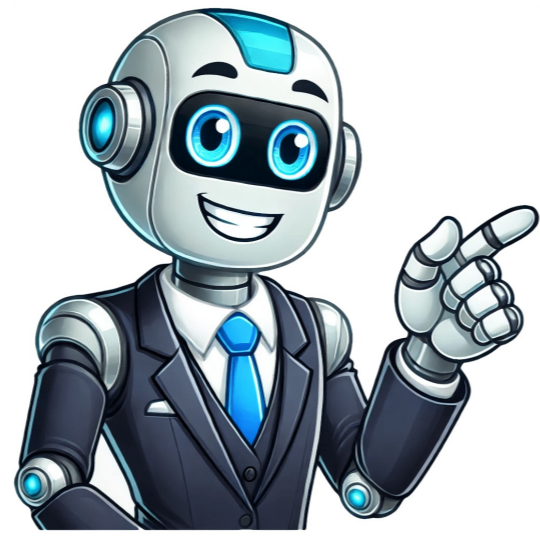


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Salesforce is renowned for its robust reporting capabilities, which are essential for analyzing and visualizing data. With the transition from Salesforce Classic to Salesforce Lightning, many users are faced with a choice: stick with the familiar Classic Reports or embrace the new Lightning Reports. This blog delves into the key differences between these two reporting frameworks, helping you understand the advantages and limitations of each to make informed decisions about your reporting strategy.

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- User Interface and Experience**
Salesforce Classic Reports: User Interface: The Classic Reports interface is straightforward but relatively limited. It relies on a traditional tabular layout with less emphasis on modern user experience enhancements. Customization options are available but are generally more cumbersome and less intuitive. **Experience:** Users familiar with Salesforce Classic often find the report creation process familiar and straightforward, though somewhat rigid. The Classic interface doesn't support the dynamic elements seen in newer reporting tools. **Salesforce Lightning Reports: User Interface:** The Lightning Experience introduces a modern, user-friendly interface with a focus on streamlined navigation and enhanced visualization. The Lightning Report Builder offers a drag-and-drop interface, making it easier to create and customize reports. **Experience:** Lightning Reports provide a more interactive and intuitive experience. Users benefit from a more dynamic and responsive environment that enhances productivity and ease of use.
- Report Creation and Customization**
Salesforce Classic Reports: Report Types: Classic Reports support standard report types, including tabular, summary, matrix, and joined reports. While functional, the process for creating and customizing these reports can be complex and less flexible. **Customization:** Customizing Classic Reports often requires manual adjustments and a good understanding of Salesforce's reporting logic. Advanced features like custom report types are available but can be challenging to configure. **Salesforce Lightning Reports: Report Types:** Lightning Reports also support tabular, summary, matrix, and joined reports. However, the new interface introduces additional flexibility and user-friendly options, such as built-in filters and enhanced visualization options. **Customization:** The Lightning Report Builder offers more powerful customization options with a drag-and-drop interface. Users can easily add filters, group data, and apply formulas without extensive technical knowledge.
- Visualization and Dashboards**
Salesforce Classic Reports: Visualization: Classic Reports provide basic visualization options, such as charts and graphs, but with limited interactivity. Visualizations are static and do not support advanced features like interactive drill-downs. **Dashboards:** Dashboards in Classic are functional but less dynamic compared to Lightning. They are created through a separate interface and have fewer options for real-time data updates and interactive elements. **Salesforce Lightning Reports: Visualization:** Lightning Reports enhance data visualization with interactive charts, graphs, and dashboards. Users can create dynamic visualizations that offer drill-down capabilities and real-time data updates. **Dashboards:** Lightning Dashboards are more versatile and interactive. They integrate seamlessly with Lightning Reports, allowing users to create custom dashboards with live data and interactive components.
- Report Sharing and Collaboration**
Salesforce Classic Reports: Sharing: Sharing Classic Reports involves setting up report folders and permissions manually. While functional, the process can be somewhat rigid and less intuitive for collaboration. **Collaboration:** Collaboration features in Classic are basic, with limited options for real-time updates and shared views. Users often rely on manual communication and updates. **Salesforce Lightning Reports: Sharing:** Lightning Reports offers more advanced sharing options. Users can share reports and dashboards directly with colleagues, teams, or public groups through a more flexible and intuitive interface. **Collaboration:** Lightning enhances collaboration with real-time updates, comments, and shared views. Users can collaborate more effectively within the Lightning Experience, benefiting from integrated communication tools.
- Performance and Scalability**
Salesforce Classic Reports: Performance: Classic Reports generally perform well for smaller datasets but may encounter performance issues with larger, more complex reports. The performance can be affected by the volume of data and the complexity of the report. **Scalability:** Classic Reports are less scalable compared to Lightning. Managing and optimizing reports for large datasets can be challenging and may require manual intervention. **Salesforce Lightning Reports: Performance:** Lightning Reports are optimized for performance, especially with larger datasets. The new infrastructure supports faster data processing and reporting, enhancing overall efficiency. **Scalability:** Lightning Reports are designed to handle large volumes of data more effectively. The platform's scalability supports advanced analytics and complex reporting needs without significant performance degradation.
- Integration with Other Salesforce Features**
Salesforce Classic Reports: Integration: Classic Reports integrate with other Salesforce features but may require additional configuration. The integration capabilities are functional but less advanced compared to Lightning. **Feature Support:** Classic Reports support basic integration with Salesforce objects, dashboards, and analytics but lack some of the advanced features found in Lightning. **Salesforce Lightning Reports: Integration:** Lightning Reports seamlessly integrates with other Salesforce features, such as Einstein Analytics, Lightning App Builder, and custom Lightning components. The integration is more advanced and streamlined. **Feature Support:** Lightning Reports support a broader range of features, including advanced analytics, AI-driven insights, and custom Lightning components. This integration enhances the overall reporting and analytics capabilities.
- Security and Access Controls**
Salesforce Classic Reports: Security: Classic Reports support basic security and access controls through report folders and permission settings. While functional, the security model is somewhat rigid and less dynamic. **Access Controls:** Managing access controls in Classic requires manual configuration and is less flexible compared to Lightning. **Salesforce Lightning Reports: Security:** Lightning Reports offer enhanced security and access controls with more granular settings. The security model supports dynamic data visibility and access based on user roles and profiles. **Access Controls:** Access controls in Lightning are more flexible and intuitive. Users can easily configure permissions and share reports securely with specific individuals or groups.
- Migration and Transition**
Salesforce Classic Reports: Migration: Migrating from Classic to Lightning Reports involves converting existing reports and dashboards to the Lightning format. This process can be time-consuming and may require adjustments to ensure compatibility. **Transition:** Transitioning from Classic to Lightning requires careful planning and testing. Users need to familiarize themselves with the new interface and features to fully leverage the benefits of Lightning. **Salesforce Lightning Reports: Migration:** Lightning Reports offers tools and features to facilitate the migration process. Salesforce provides guidance and support to help users transition from Classic to Lightning smoothly. **Transition:** The transition to Lightning is generally straightforward, with resources and support available to assist users in adapting to the new reporting framework.
- Support and Documentation**
Salesforce Classic Reports: Support: Classic Reports are supported by Salesforce's extensive documentation and community resources. However, as Salesforce focuses more on Lightning, support for Classic may be less prominent. **Documentation:** Documentation for Classic Reports is comprehensive but may not include the latest updates and best practices. **Salesforce Lightning Reports: Support:** Lightning Reports benefit from active support and regular updates from Salesforce. The Lightning Experience receives ongoing enhancements and new features based on user feedback. **Documentation:** Documentation for Lightning Reports is up-to-date and includes detailed guides, tutorials, and best practices. Users have access to a wealth of resources to assist with the new reporting framework. The transition from Salesforce Classic Reports to Lightning Reports represents a significant upgrade in terms of user experience, functionality, and performance. While Classic Reports remains functional and familiar to long-time users, Lightning Reports offers a more modern, flexible, and powerful reporting environment. By understanding the key differences between these two reporting frameworks, users can make informed decisions about their reporting strategy and leverage the full potential of Salesforce's reporting capabilities. Whether sticking with Classic or embracing Lightning, each framework has its unique advantages and considerations, and the choice ultimately depends on your organization's needs and goals.

Salesforce classic vs lightning. Salesforce reports classic vs lightning.