

FREE CHECKLIST

The report clean-up checklist

Four steps to clear out unused Salesforce reports, give the rest an owner, and stop the pile growing back.

1

Find what is actually used

2

Give every report an owner

3

Archive, don't delete

4

Stop it growing back

STEP 1

Find what is actually used

Before you change anything, get the facts. Salesforce records when every report was last run, so you can see what people really use.

Build a "report on reports"

- ☐ In Reports, click **New Report** and choose the **Reports** report type (under Administrative Reports).
- ☐ Add the columns: Report Name, Folder, Created By, Created Date, Last Modified Date and **Last Run**.
- ☐ Sort by Last Run, oldest first. Reports that have never been run show a blank Last Run date.
- ☐ Save it in a private folder as "Report audit". You will reuse it every quarter.

Sort reports into three lists

List	Rule of thumb	Count
Keep	Run in the last 90 days, or used in a dashboard.	
Check	Not run in 90 days, but owned by someone still here.	
Archive	Never run, not run in 12 months, or created by a leaver.	

Dashboards depend on reports. Before archiving anything, check whether it feeds a dashboard. Open each dashboard and note the source report behind every component, then move those reports to Keep.

Quick wins to look for

- ☐ Copies with names like "v2", "copy", "test", "old" or a person's name.
- ☐ Reports created by people who have since left.
- ☐ Several reports showing the same thing with different filters.

STEP 2

Give every report an owner

Reports without an owner never get tidied. Move the keepers into a simple folder structure and name one person per folder who signs off changes.

A folder structure that works

Folder	What goes in it	Access
Leadership	Board and director reporting	Viewer for leaders
One folder per team	Perm, contract, temp or by region	Viewer for the team
Finance and compliance	Billing, margin, right-to-work, GDPR	Viewer for those teams
Archive - to be removed	Reports waiting to be deleted (step 3)	Admins only

Folder access levels in Salesforce are Viewer, Editor and Manager. Give most people Viewer and keep Editor and Manager to the folder owner.

Owner sign-off sheet

Folder	Owner	Reviewed on	Reports kept	Reports archived

STEP 3

Archive, don't delete

Deleting straight away is how you break the one report the finance director relies on. Give people a safe window to shout first.

- ☐ Move everything on your Archive list into the "Archive - to be removed" folder.
- ☐ Tell the business: what is moving, where it has gone, and the date it will be deleted.
- ☐ Wait 30 days. If someone needs a report back, move it into the right team folder with an owner.
- ☐ After 30 days, delete what is left. Deleted reports sit in the Recycle Bin for 15 days, so you still have a short safety net.

Message you can send

"We're tidying up our Salesforce reports. Anything not used in the last few months has been moved to the folder 'Archive - to be removed' and will be deleted on _____. If you still need one, let _____ know before then."

STEP 4

Stop it growing back

A clean-up only lasts if new reports stop appearing for every small request.

- ☐ Review who has the **Create and Customize Reports** and **Report Builder** permissions. Keep them to report owners.
- ☐ Limit **Manage Reports in Public Folders** and **Create Report Folders** to admins.
- ☐ Agree a naming format, for example: Team - What it shows - Time period.
- ☐ Set up one route for report requests, so the admin can spot duplicates before building.
- ☐ Run your "Report audit" report every quarter and repeat steps 1 to 3.

Report governance policy

Fill this in, agree it with your leadership team and share it with everyone who uses Salesforce.

Who can create reports: _____

Who can create folders: _____

How to request a new report: _____

Naming format: _____

Reports unused for _____ days are archived.

Archived reports are deleted after _____ days.

Policy owner: _____ Review date: _____

Quarterly review checklist

- ☐ Run the "Report audit" report and update the Keep, Check and Archive lists.
- ☐ Ask each folder owner to confirm their reports.
- ☐ Remove report permissions from leavers and role changes.
- ☐ Delete anything that has been in the archive folder past its date.
- ☐ Note how many reports you started and finished with.

Want fewer reports in the first place?

Altitude, powered by Reckiapp, gives everyone one dashboard that follows your role hierarchy, so people get the view they need without new reports being saved.

reckiapp.io/altitude