Salesforce Dashboards

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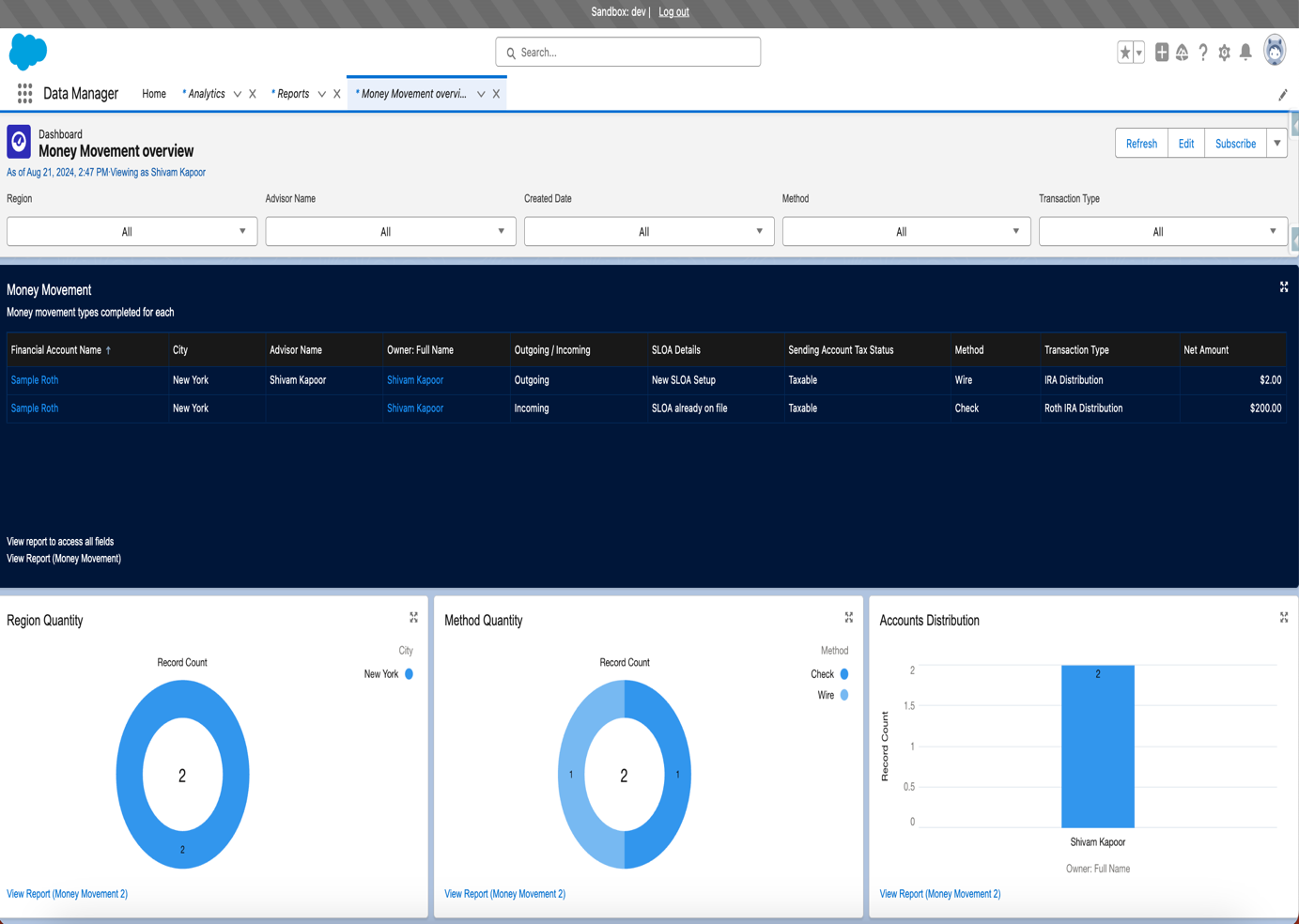
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# Notes:

1. More reports could be suggested based on the actual data for analysis.
2. The following dashboards consist of basic reports dependent on the fields relevant to the records and relationships.
3. All Reports and Dashboards are public, in case any report/ dashboard does not open, check for access and have the folder changed to Public.

# Money Movement Overview Dashboard

Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000b7dEAA/view?queryScope=userFolders>



# Standard Process/ Account Opening or Funding Dashboard

Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bFhEAI/view?queryScope=userFolders>

A screenshot of a computer

Description automatically generated

# RMS and Gifting Dashboards

## RMD Transactions Dashboard

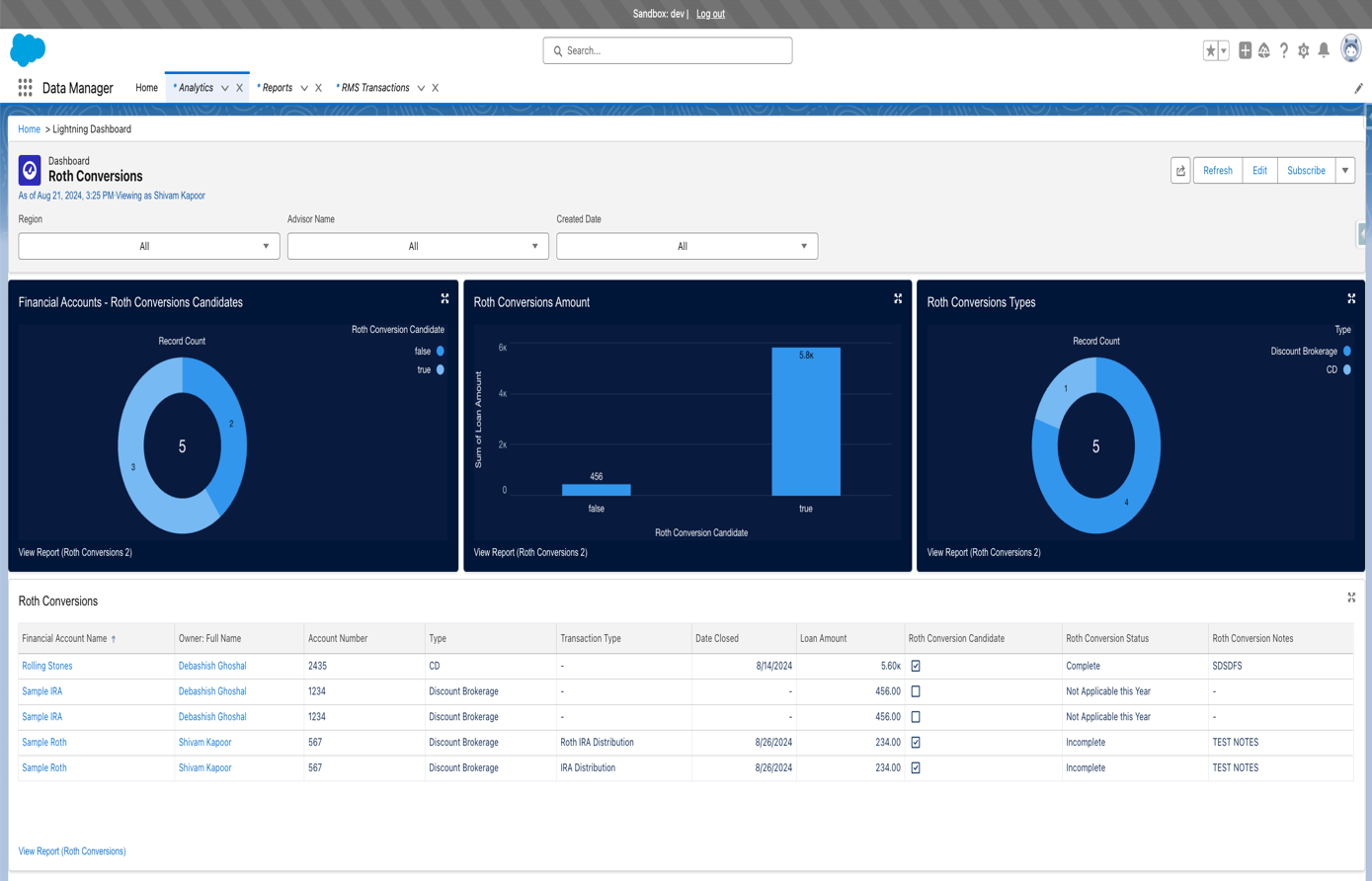
Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000b9FEAQ/view?queryScope=userFolders>

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## Roth Conversions Dashboard

Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bArEAI/view?queryScope=userFolders>



## Charitable Gifting Dashboard

Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bCTEAY/view?queryScope=userFolders>

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## Retirement Account Funding Dashboard

Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bE5EAI/view?queryScope=userFolders>

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# Beneficiary Update standard process dashboard

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bHJEAY/view?queryScope=userFolders

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# Financial Plan

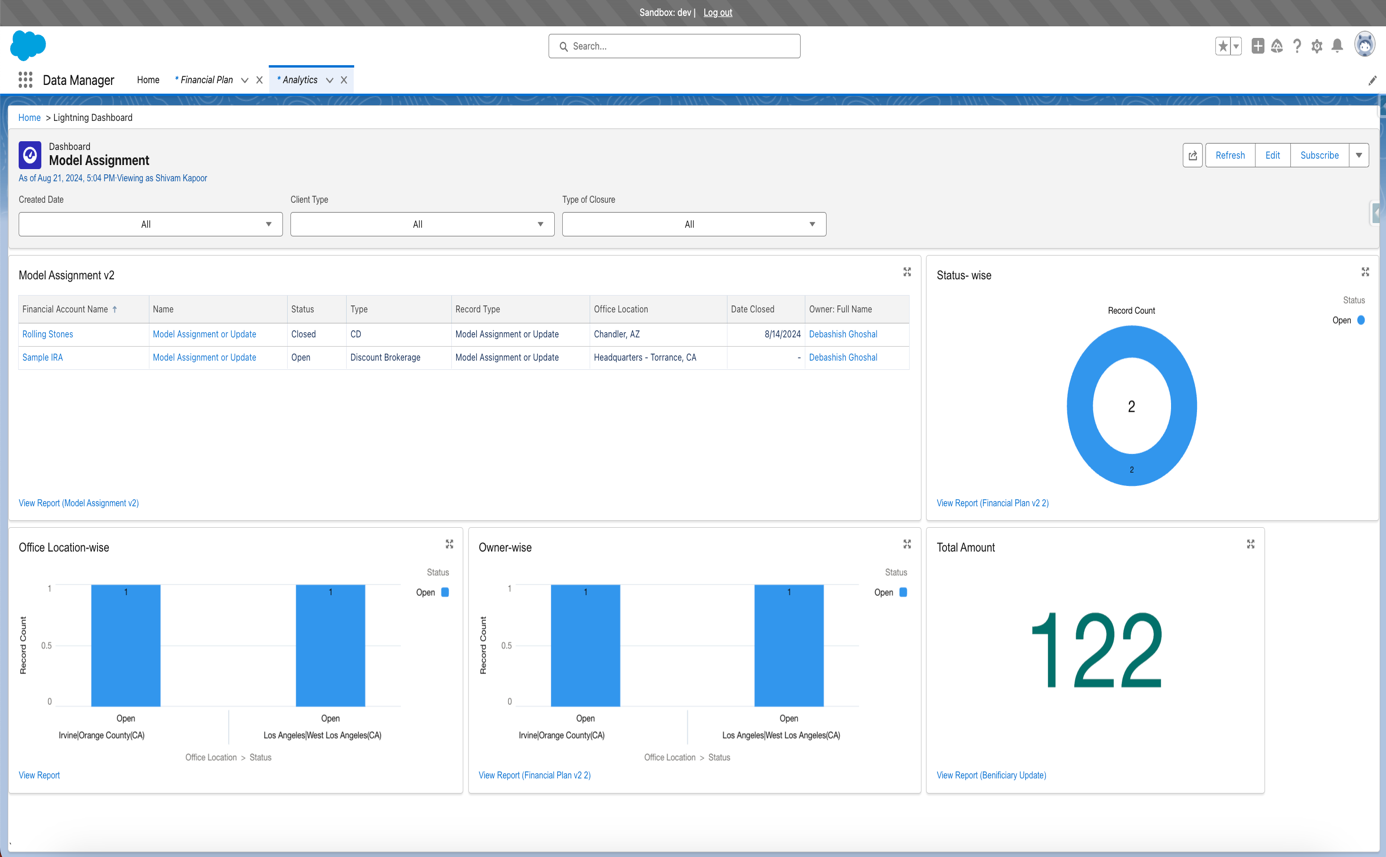
Link: <https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bKXEAY/view?queryScope=userFolders>

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# Model Assignment

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bM9EAI/view?queryScope=userFolders



# Client Meetings

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bNlEAI/view?queryScope=userFolders

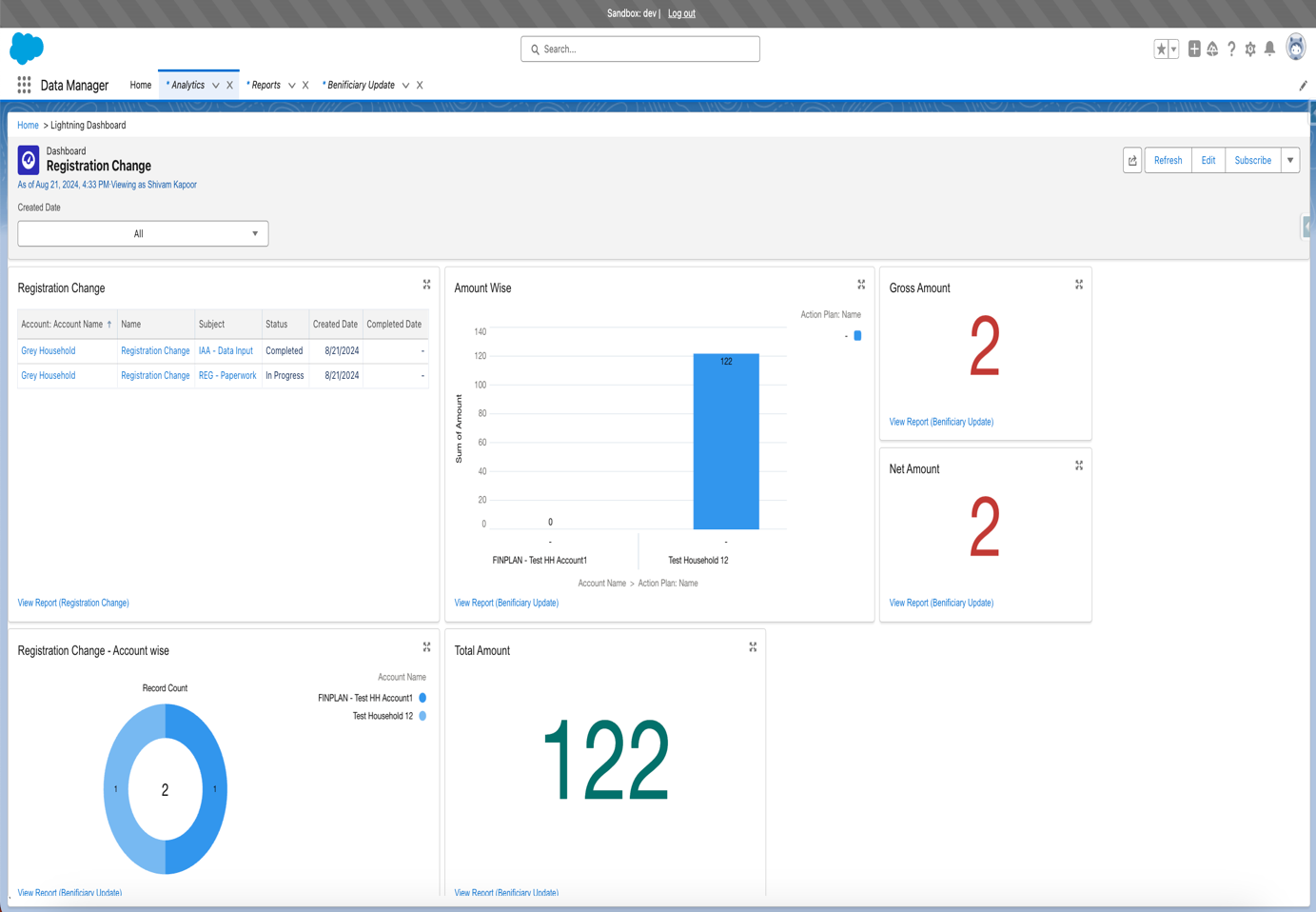
A screenshot of a computer

Description automatically generated

# Registration Change

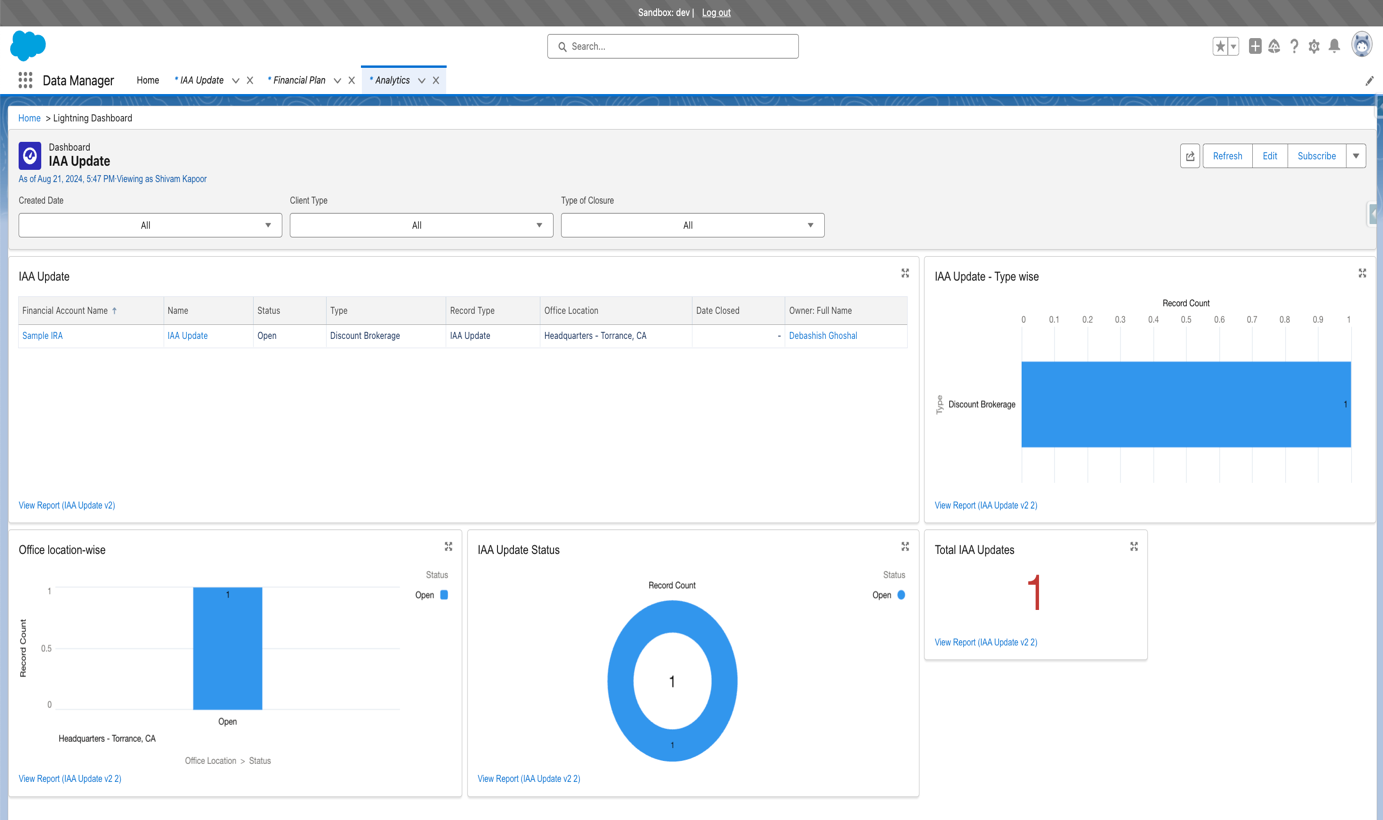
Note: The amounts are sample reports on different record types (because of insufficient data in the developer org) and would be based on the record type with actual data.

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bIvEAI/view?queryScope=userFolders



# IAA Update

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bPNEAY/view?queryScope=userFolders



# High Net Worth

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000bQzEAI/view?queryScope=userFolders

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# Transfer of Account

Link: https://epwa--dev.sandbox.lightning.force.com/lightning/r/Dashboard/01Zdi0000000blxEAA/view?queryScope=userFolders

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