

Salesforce Certified Admin and App Builder

Lesson 11—Dashboards



What You'll Learn

- Creating a Dashboard
- Managing Access to Reports
- Adding a Report as a Dashboard Component
- Enabling Dashboards for iPad
- Activating the Report Builder on Profiles



Understanding Dashboard Components



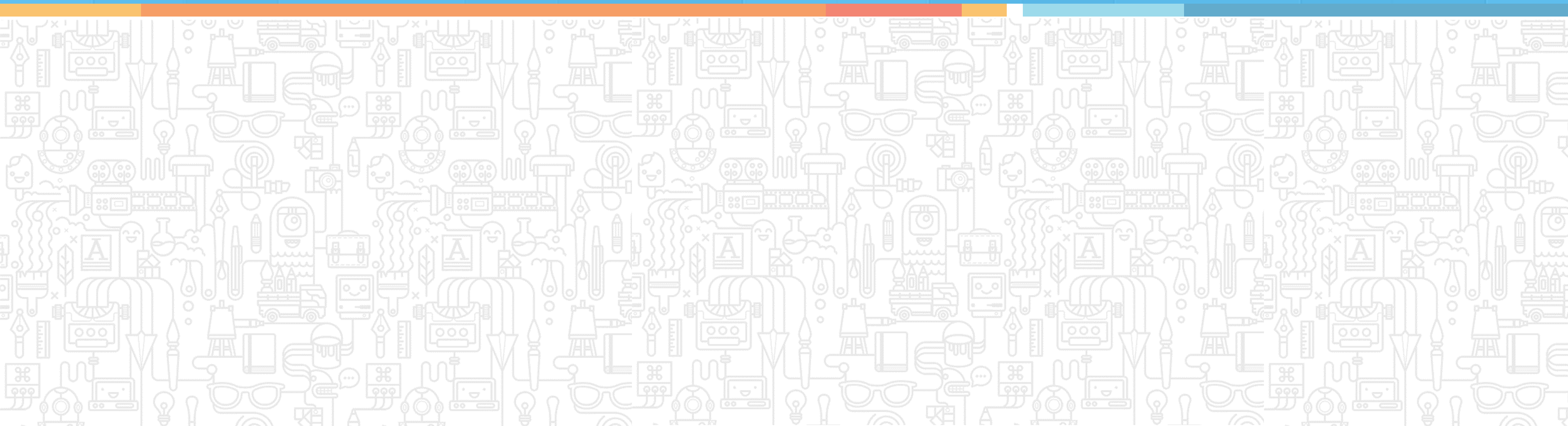
Dashboard components help you visually present data in reports.

Data is represented in the form of following charts:

- Horizontal bar
- Vertical bar
- Line
- Pie
- Donut
- Funnel
- Scatter
- Gauge
- Metric
- Table

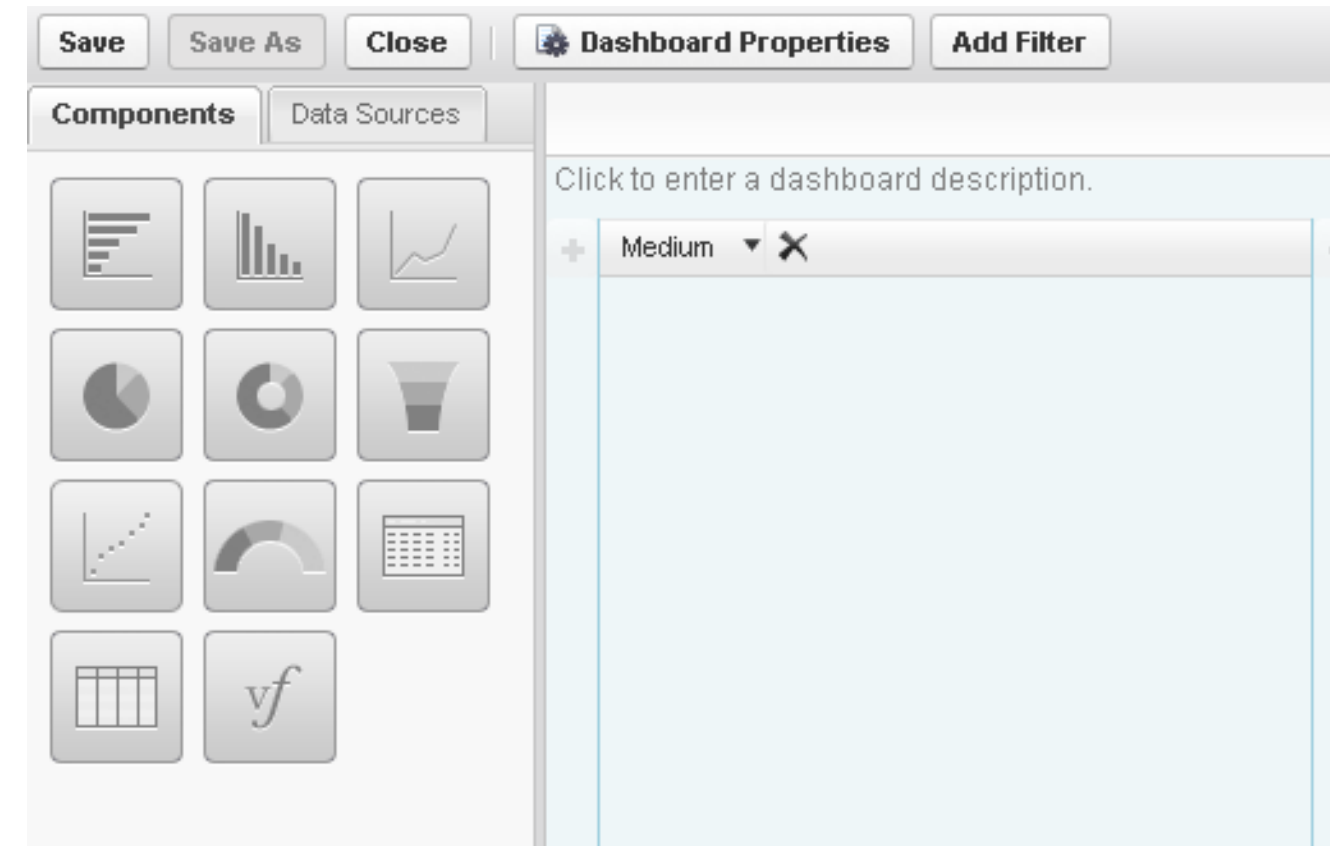


Creating a Dashboard



A dashboard must be first created to add components. To create a dashboard:

- First create a custom report to contain the data you want to display.
- Go to the Dashboard Tab and click New Dashboard.
- Click and Drag a component to the column.
- Click the Data Sources tab and find the report you created, then drag and drop.
- Click the wrench at the top right to edit the attributes.
- Name your dashboard and click Save.



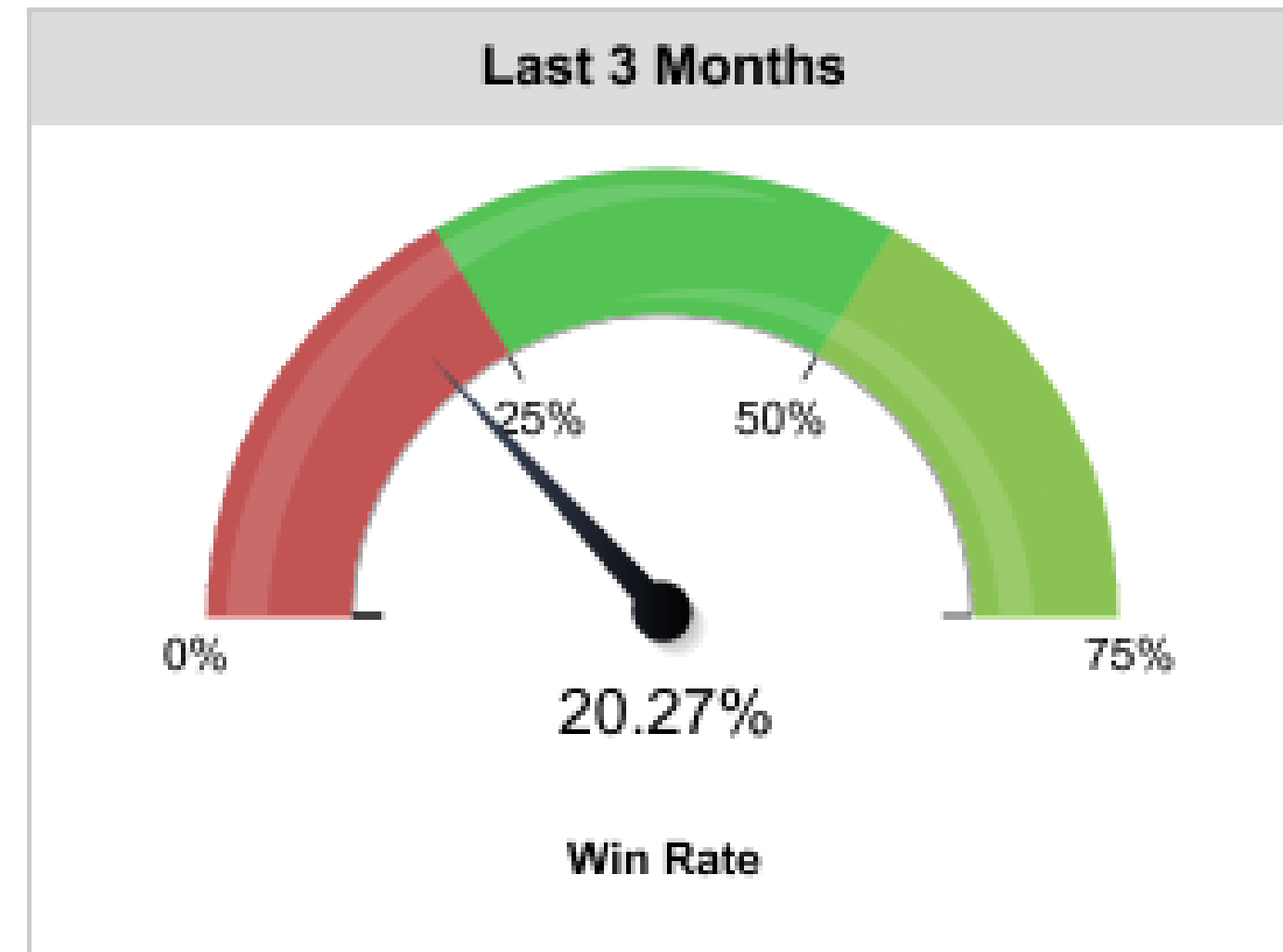
Refreshing a Dashboard



Dashboards are refreshed to display the recently updated information:

- The dashboard you created is now displayed on the homepage.
- In your dashboard section of the homepage, click the refresh button to update and show the current statistics.
- It may take a minute to refresh.
- You'll see the refreshing starts when a grey and red circle becomes animated in the top-right corner of each component.

Closing Rate

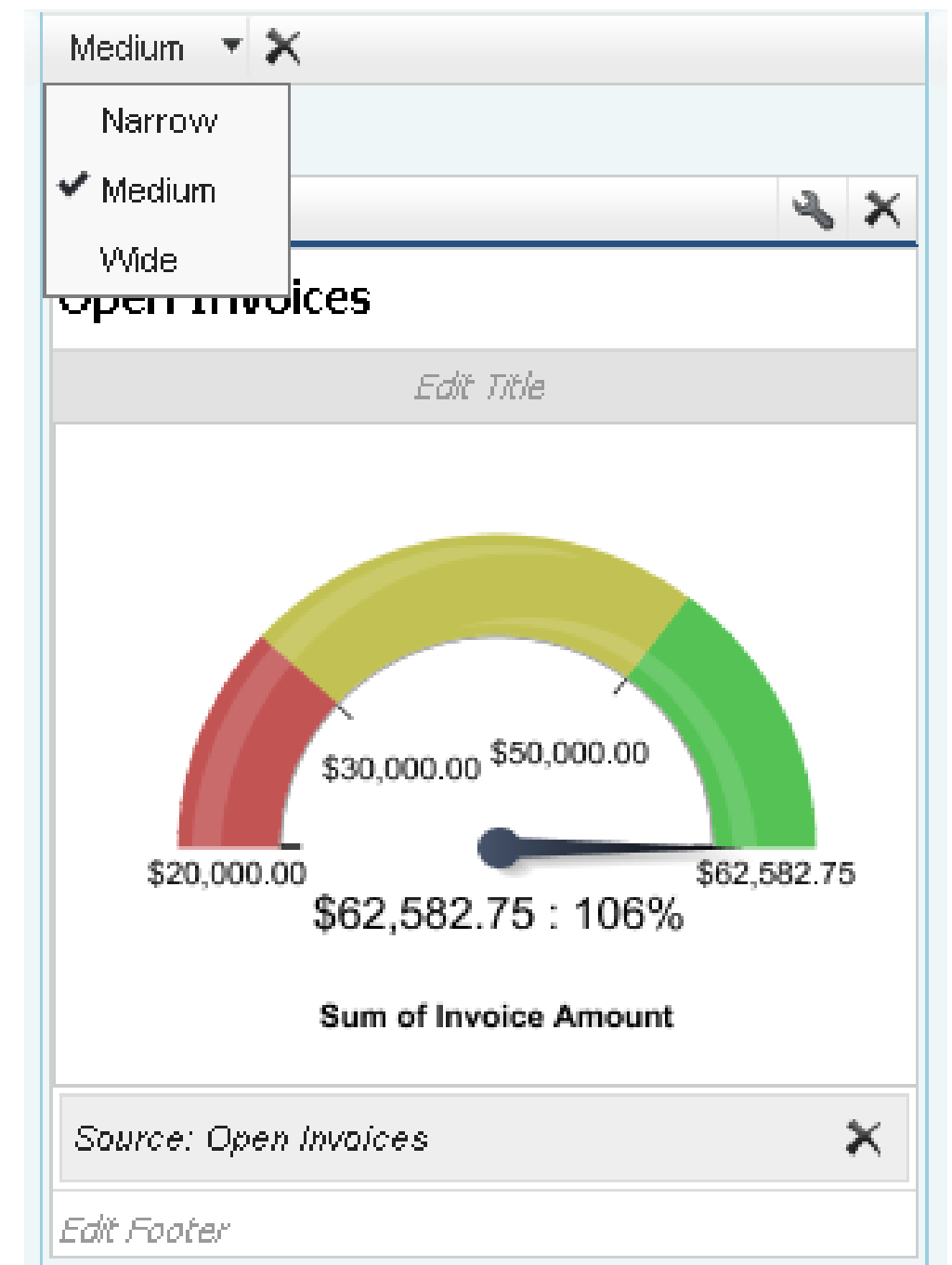


Modifying Columns on Dashboards



Dashboard columns can be adjusted to accommodate a wide range of display sizes. Following are the features of columns on dashboard:

- You can adjust the width and number of columns visible.
- The narrow, medium, and wide width options are preset.
- Changing these options changes how the dashboards will display on your monitor.
- The default medium option works well for most users.
- To modify the columns click edit on the dashboard you want to change.
- Click the arrow next to medium to make your changes.




Adding Filter to Dashboard





Filters allow one universal dashboard. Keep in mind the following while adding filter to dashboard:

- Filters cannot be used when Visualforce is a component.
- While you cannot add filters on bucket fields, you can choose to display bucket fields as columns on the report.
- Filters are not used when a dashboard is emailed.
- Custom formula fields cannot be used as a filter.

Add Filter [Help for this Page](#) 


Field






Due Date 

 69 equivalent fields

Display Label

Due Date

Filter Options 

Operator	Value
<div>equals </div>	<div>Group Name 12/9/2015  </div>
<div> Add Row </div>	

OK

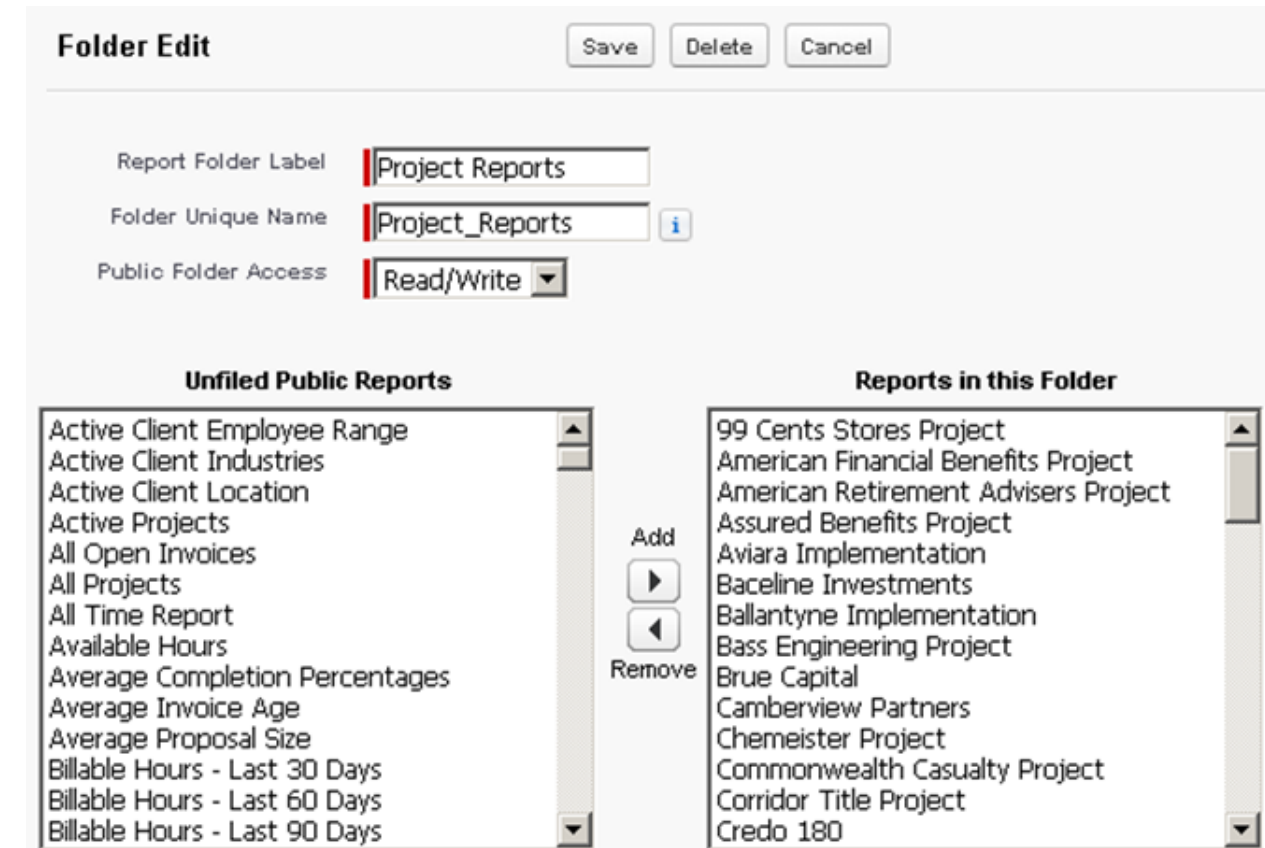
Cancel

Managing Access to Reports



Salesforce offers following folder restrictions for basic report:

- My Personal Reports and Dashboards folder allows access only to the user.
- All other reports and dashboards are shared and the access is controlled by the settings on each folder.
- To change the access to a folder, right-click the folder name.
- Click pin and click edit.
- You can share these folders by users, roles, and public groups.

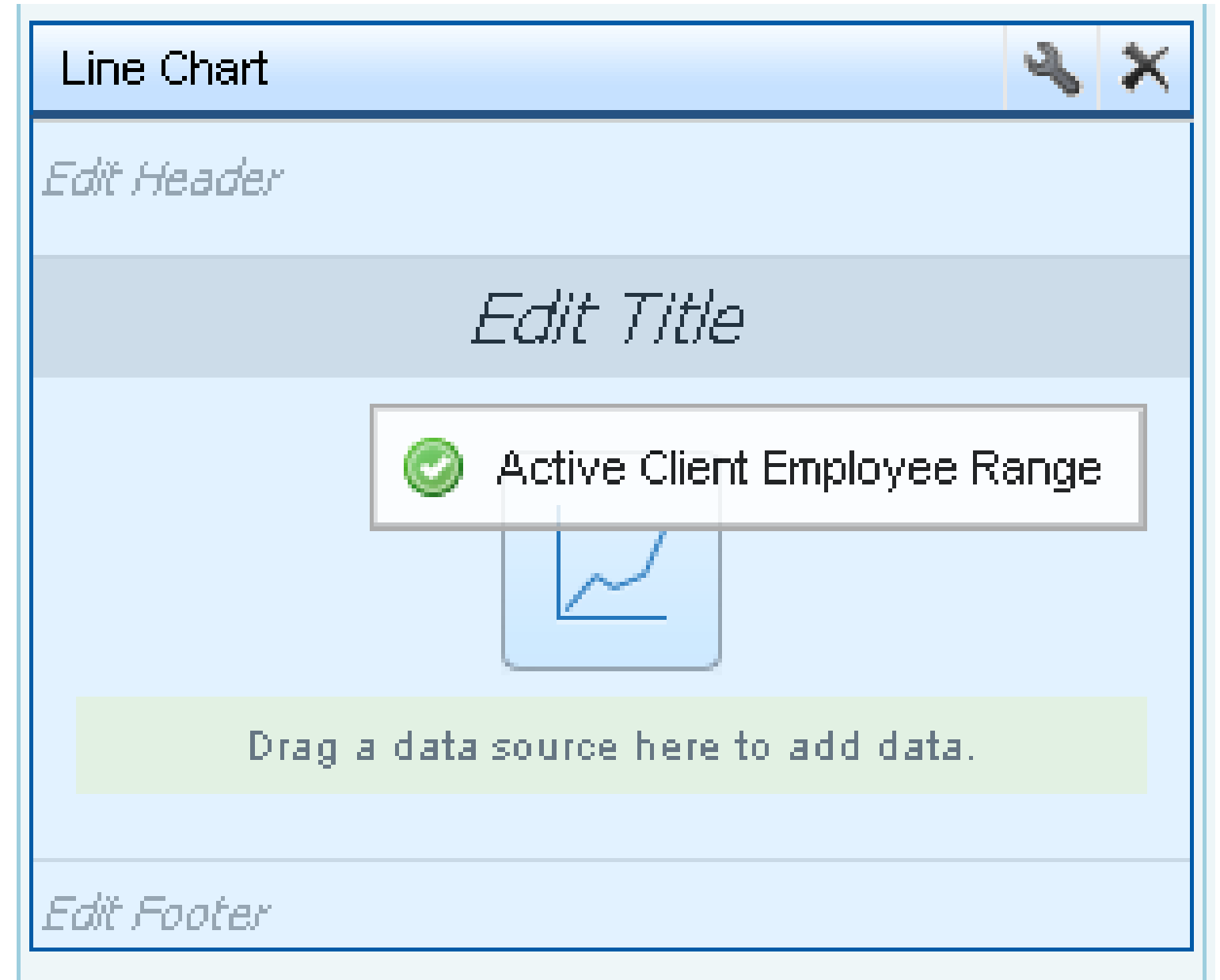


Adding a Report as a Dashboard Component

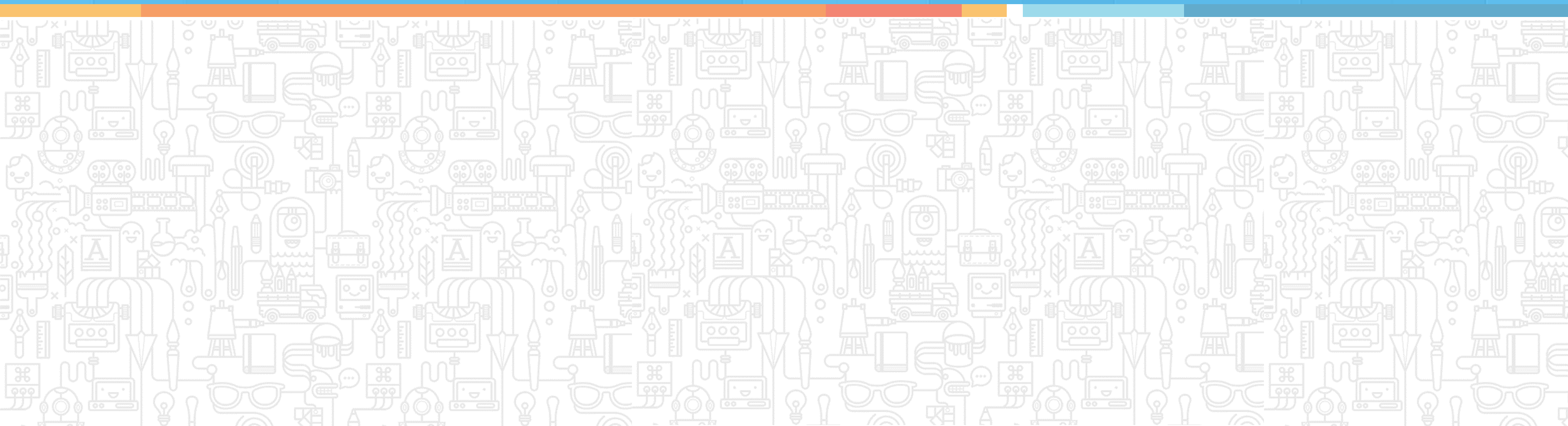


Components are charts on Dashboards:

- Navigate to the Dashboard you wish to edit.
- Click Edit, then click Components.
- Drag and drop the component type.
- Search for the desired report, drag and drop.

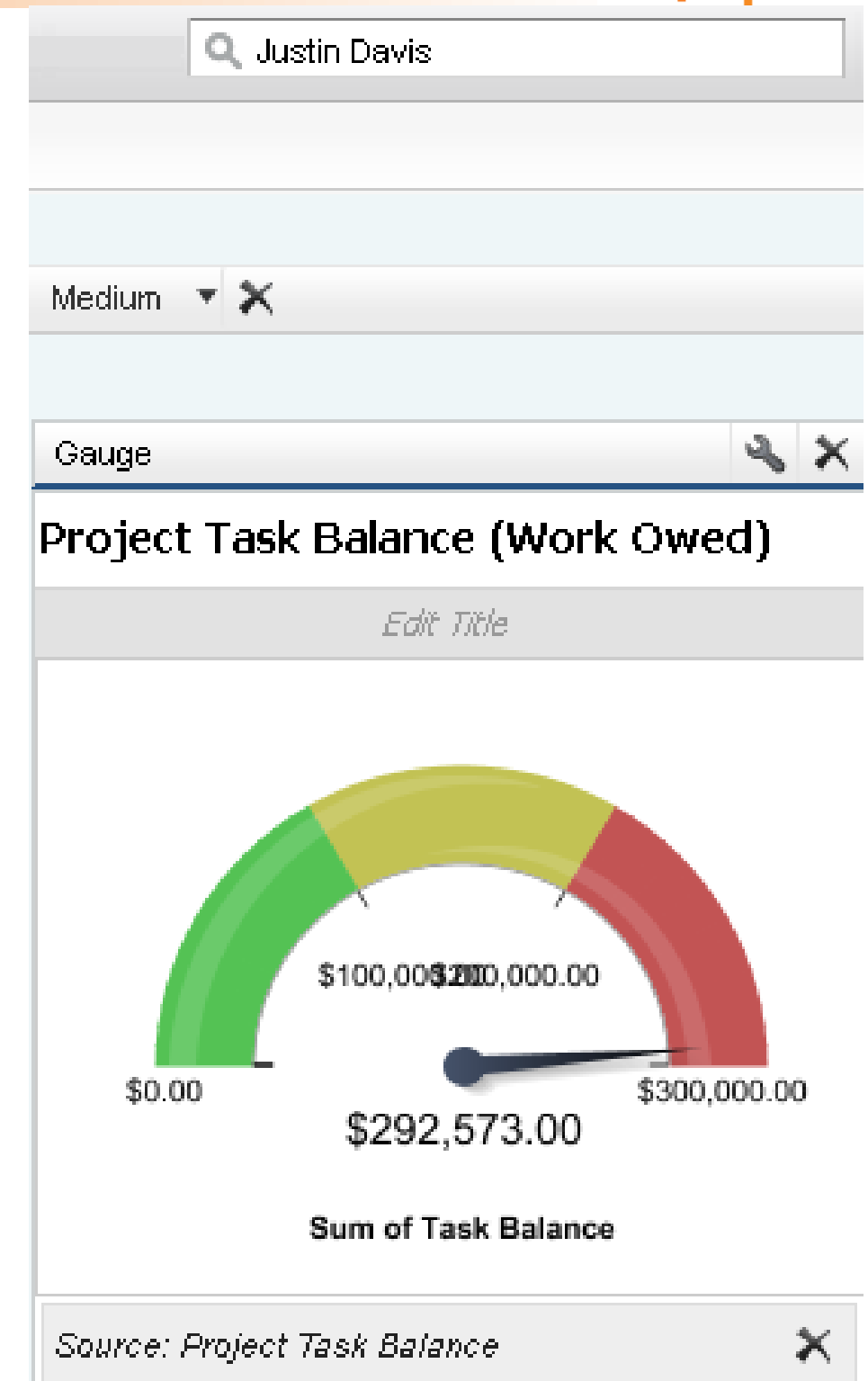


Setting Up Dynamic Dashboards



Dynamic dashboards are tailored to a specific user as opposed to a single user.

- Use dynamic dashboards to show user specific data.
- Use a normal dashboard to show company or regional data.
- To create a dynamic dashboard first create or edit an existing dashboard.
- Click the down arrow next to the 'View Dashboards' as field.
- Select Run as logged-in user.



Enabling Dashboards for iPad

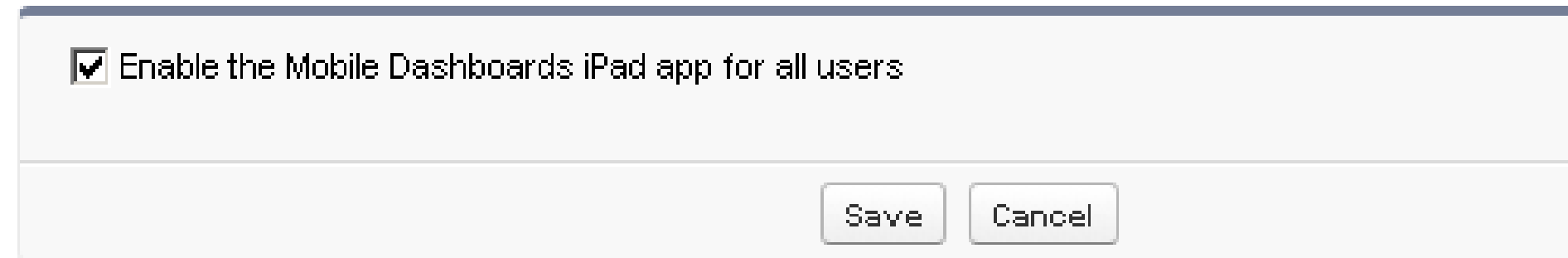


To enable dashboards on an iPad:

- Go to the set up area and click Mobile Administration.
- Select Mobile Dashboard Settings.
- Click Enable and Save.

Mobile Dashboard Settings

Salesforce.com's Mobile Dashboards iPad application is available from Apple's App Store.



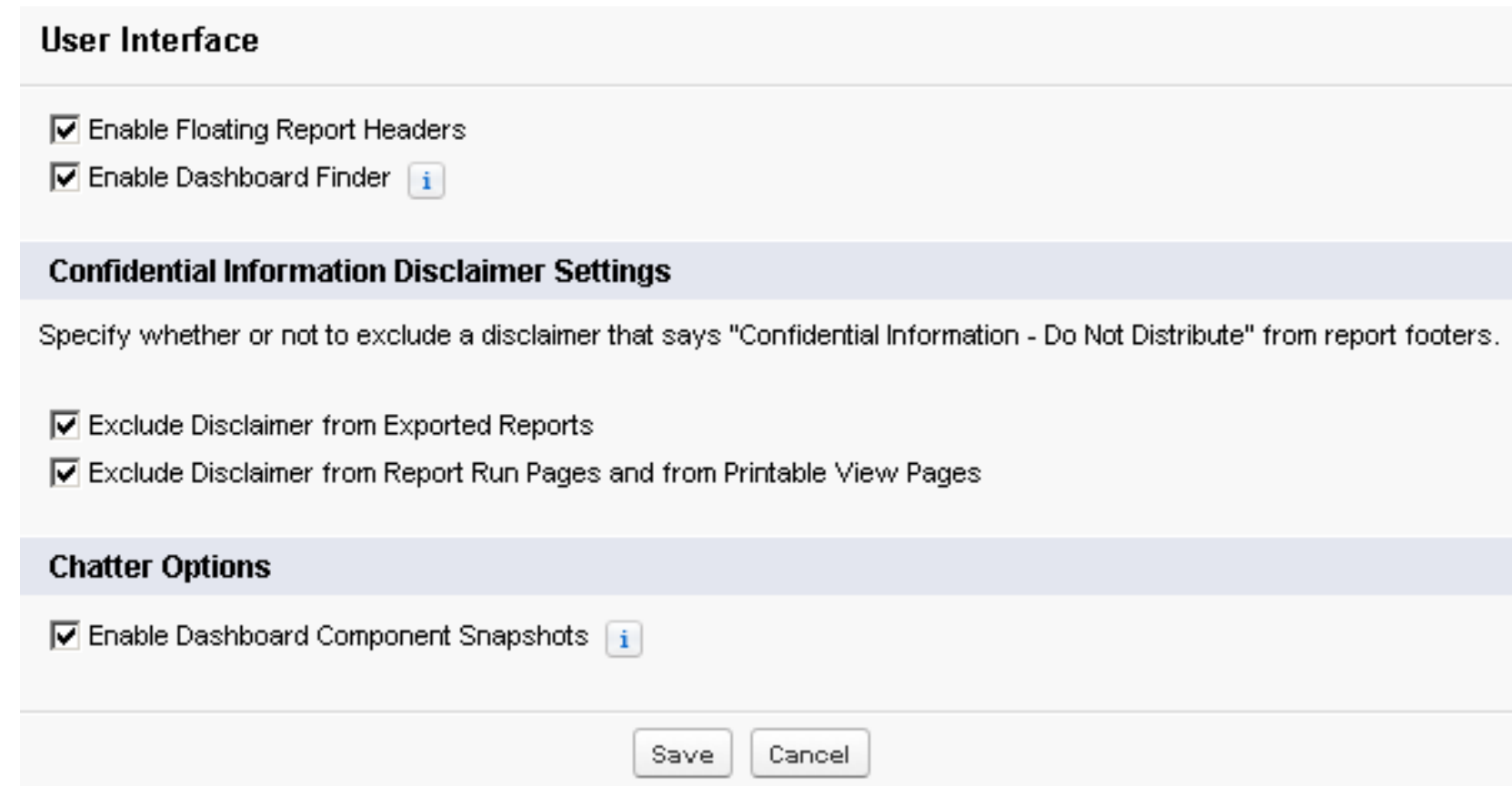
A screenshot of a settings dialog box titled "Mobile Dashboard Settings". It features a checkbox labeled "Enable the Mobile Dashboards iPad app for all users" which is checked. At the bottom right, there are two buttons: "Save" and "Cancel".

Modifying Report and Dashboard Interfaces



You can modify the settings for report and dashboard interface.

- The features available are floating report headers, dashboard finder, dashboard component snapshots, and exclude the confidential disclaimer at the bottom of reports.
- To modify the changes, go to the set up area and click Customize.
- Click Reports and Dashboards.
- Click Reports and Dashboards settings.
- Modify the listed features and click Save.



The screenshot shows a settings panel titled "User Interface". It contains three sections: "User Interface" with checkboxes for "Enable Floating Report Headers" and "Enable Dashboard Finder" (with an info icon); "Confidential Information Disclaimer Settings" with a descriptive text and two checkboxes for excluding disclaimers from reports and view pages; and "Chatter Options" with a checkbox for "Enable Dashboard Component Snapshots" (with an info icon). At the bottom right are "Save" and "Cancel" buttons.

User Interface

- ☒ Enable Floating Report Headers
- ☒ Enable Dashboard Finder [i](#)

Confidential Information Disclaimer Settings

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- ☒ Exclude Disclaimer from Exported Reports
- ☒ Exclude Disclaimer from Report Run Pages and from Printable View Pages

Chatter Options

- ☒ Enable Dashboard Component Snapshots [i](#)





Save Cancel

Activating the Report Builder on Profiles



Report Builder is an editor that will help you create reports faster:

- It is available to all users but you must enable it for each profile.
- Go to profiles and click on the profile you want to enable.
- Click edit and scroll down the page to the general users permissions.
- Click the box next to report builder.
- Click Save.

Mass Edits from Lists	<input type="checkbox"/>
Mass Email	<input type="checkbox"/> 
Merge Topics	<input type="checkbox"/> 
Report Builder	<input type="checkbox"/> 
Run Flows	<input type="checkbox"/>
Run Reports	<input type="checkbox"/>
Send Email	<input type="checkbox"/> 



QUIZ

1

What is the best way to refresh a dashboard?

- a. Refresh your browser.
- b. Click the refresh button on the dashboard.
- c. Click on a dashboard component.
- d. Change the running user.



QUIZ

1

What is the best way to refresh a dashboard?

- a. Refresh your browser.
- b. Click the refresh button on the dashboard.
- c. Click on a dashboard component.
- d. Change the running user.



The correct answer is **b**.

The only way to refresh a dashboard is to click the refresh button on the dashboard.

QUIZ

2

What are the maximum number of columns allowed on a dashboard?

- a. 1
- b. 2
- c. 3
- d. 4



QUIZ

2

What are the maximum number of columns allowed on a dashboard?

- a. 1
- b. 2
- c. 3
- d. 4



The correct answer is **c**

The maximum number of columns allowed is three.

QUIZ

3

What does the dynamic dashboard feature accomplish?

- a. Displays the same charts regardless of who's viewing them.
- b. Revises the data displayed based on who's viewing them.
- c. Automatically emails report to designated users.
- d. Create a printable view.



QUIZ

3

What does the dynamic dashboard feature accomplish?

- a. Displays the same charts regardless of who's viewing them.
- b. Revises the data displayed based on who's viewing them.
- c. Automatically emails report to designated users.
- d. Create a printable view.



The correct answer is **b**.

Dynamic dashboards allow for the automatic revision of data based on who's logged in and viewing the dashboard.

QUIZ

4

What do filters on dashboards accomplish?

- a. Allow global criteria to be applied across all components.
- b. Remove components the user does not have permission to view.
- c. Reorder components based on relevancy.
- d. Update security of underlying records.



QUIZ

4

What do filters on dashboards accomplish?

- a. Allow global criteria to be applied across all components.
- b. Remove components the user does not have permission to view.
- c. Reorder components based on relevancy.
- d. Update security of underlying records.



The correct answer is **a**.

Filters allow users and administrators to filter all components based on global criteria, such as account type or billing state.

QUIZ

5

Which standard user profile can modify dashboards?

- a. Standard User
- b. System Administrator
- c. Contract Manager
- d. Marketing User



QUIZ

5

Which standard user profile can modify dashboards?

- a. Standard User
- b. System Administrator
- c. Contract Manager
- d. Marketing User



The correct answer is **b**.

Of the standard profiles, only system administrators can modify dashboards.



Case Study

Scenario Analysis Solution

United Containers needs a way to display multiple reports on one screen. Currently, multiple screens are required to view relevant data in company meetings. Additionally, there is no way to correctly chart and graph the sales and customer service metrics in a side-by-side manner. Also, there is no way to control which individuals can see which chart data using the existing reporting methods.

Scenario Analysis Solution

United Containers decides to create a Salesforce dashboard for the following reasons:

1. Dashboards can be set up to display up to 20 relevant report charts.
2. Security can be adjusted to only display data relevant to the user viewing it.
3. Three columns of charts allow for side-by-side comparison of department metrics.

Scenario Analysis Solution

United Containers performs the following steps to remedy its situation:

1. Creates a new dashboard called Company Metrics.
2. Creates ten Salesforce reports to display sales data in the first column.
3. Creates five Salesforce reports to display customer service data in the second column.
4. Enables the dynamic user feature to customize the data displayed on a per user basis.

Key Takeaways

- Salesforce Dashboards can be created to display multiple report charts.
- The Dynamic User feature can ensure users see data only relevant to them.
- Dashboards can be refreshed and e-mailed automatically.



This concludes 'Dashboards.'

The next Lesson is 'Data Management.'