



# Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

*Jamie Christian II*



# Project Overview

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# Project Overview



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# Task 1: Create a Tabular Report

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*On the following slide, insert a screenshot of the tabular report you just created and ran.*

# Task 1: Create a Tabular Report



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Opportunities  
**Closed-Won- New Customers (All Time)**

Total Records 7

	Stage	Expected Revenue	Type	Opportunity Name
1	Closed Won	\$220,000.00	New Customer	Express Logistics Standby Generator
2	Closed Won	\$85,000.00	New Customer	GenePoint Standby Generator
3	Closed Won	\$75,000.00	New Customer	Edge Emergency Generator
4	Closed Won	\$50,000.00	New Customer	University of AZ Portable Generators
5	Closed Won	\$915,000.00	New Customer	United Oil Refinery Generators
6	Closed Won	\$235,000.00	New Customer	Burlington Textiles Weaving Plant Generator
7	Closed Won	\$210,000.00	New Customer	Grand Hotels Emergency Generators

To Do List

## Task 2: Create a Summary Report



P A T H S T R E A M

*On the following slide, insert a screenshot of the summary report you just created and ran.*

# Task 2: Create a Summary Report



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Report: Opportunities  
**Closed-Won- New Customers (All Time)**

Total Records	7								
<input type="checkbox"/> Industry	↑	<input type="checkbox"/> Stage	↓	<input type="checkbox"/> Expected Revenue	↓	<input type="checkbox"/> Type	↓	<input type="checkbox"/> Opportunity Name	↓
<input type="checkbox"/> Apparel (1)		Closed Won		\$235,000.00		New Customer		Burlington Textiles Weaving Plant Generator	
<b>Subtotal</b>									
<input type="checkbox"/> Biotechnology (1)		Closed Won		\$85,000.00		New Customer		GenePoint Standby Generator	
<b>Subtotal</b>									
<input type="checkbox"/> Education (1)		Closed Won		\$50,000.00		New Customer		University of AZ Portable Generators	
<b>Subtotal</b>									
<input type="checkbox"/> Electronics (1)		Closed Won		\$75,000.00		New Customer		Edge Emergency Generator	
<b>Subtotal</b>									
<input type="checkbox"/> Energy (1)		Closed Won		\$915,000.00		New Customer		United Oil Refinery Generators	
<b>Subtotal</b>									
<input type="checkbox"/> Hospitality (1)		Closed Won		\$210,000.00		New Customer		Grand Hotels Emergency Generators	
<b>Subtotal</b>									
<input type="checkbox"/> Transportation (1)		Closed Won		\$220,000.00		New Customer		Express Logistics Standby Generator	
<b>Subtotal</b>									
<b>Total (7)</b>									

Row Counts  Detail Rows  Subtotals  Grand Total

## Task 3: Create a Matrix Report



*On the following slide, insert a screenshot of the matrix report you just created and ran.*

# Task 3: Create a Matrix Report



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Opportunities  
**Closed-Won- Matrix Report**

Industry	Stage	Closed Won	Total
Apparel	Record Count	1	1
Biotechnology	Record Count	1	1
Education	Record Count	1	1
Electronics	Record Count	1	1
Energy	Record Count	1	1
Hospitality	Record Count	1	1
Transportation	Record Count	1	1
<b>Total</b>	<b>Record Count</b>	<b>7</b>	<b>7</b>

Details (7 Rows) Click an intersection in the table above to filter details.

	Expected Revenue	Type	Opportunity Name
1	\$235,000.00	New Customer	Burlington Textiles Weaving Plant Generator
2	\$85,000.00	New Customer	GenePoint Standby Generator
3	\$50,000.00	New Customer	University of AZ Portable Generators
4	\$75,000.00	New Customer	Edge Emergency Generator
5	\$915,000.00	New Customer	United Oil Refinery Generators
6	\$210,000.00	New Customer	Grand Hotels Emergency Generators

Row Counts Detail Rows Grand Total Stacked Summaries

To Do List

## Task 4: Business Case Analysis



P A T H S T R E A M

*In a short paragraph on the following slide, describe how using various reports in Salesforce would help SimplySocial make data-driven decisions. In your description, include:*

- The overall purpose of reports, report filters, and report types
- The major steps you took to create various reports
- How SimplySocial would benefit from using reports

## Task 4: Business Case Analysis



P A T H S T R E A M

Using Salesforce reports allows SimplySocial to make more informed, data-driven decisions by centralizing critical sales data into clear, actionable insights. I created three reports: a tabular report of closed won opportunities from new customers, a summary report of leads currently marked as "Working Contacted" grouped by lead source, and a matrix report showing total and average expected revenue for open opportunities with greater than 30% probability, grouped by stage and type. Throughout the process, I applied filters like Close Date, Opportunity Status, and Probability to refine results, and leveraged grouping and summarizing tools to highlight trends. These reports enable the sales team to monitor pipeline performance, track lead quality by source, and identify the most valuable stages and deal types, ultimately supporting smarter strategy and better revenue forecasting.

## Task 5: Create a New Report



P A T H S T R E A M

*On the following slide, insert a screenshot of the new report you just created and ran.*

# Task 5: Create a New Report



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Leads  
**New Leads Report**

	First Name	Last Name	Title	Company / Account	Email	Lead Source	Street	Rating	Lead Owner
1	Thandiwe	Bandi	Social Media Marketer	Jazz Mystics Music Group	tbandi@jazzmystics.com	-	-	Warm	Jamie Christian
2	Denise	Choi	Director of Marketing Operations	Yahoo Search	dchoi@yalooyoyos.com	-	-	Hot	Jamie Christian
3	Chidi	Seydou	Social Media Intern	Attitude Talent Agency	chidiseydou415@attitude.com	-	-	-	Jamie Christian
4	Manisha	Visvanathan	Senior Growth Marketing Manager	Growlers and Stuff Craft Brewery	manishavis@growlers.com	-	-	-	Jamie Christian
5	Janet	Steinberg	Social Media Marketing Manager	Costumez Warehouse	janet.steinberg@costumez.com	-	-	Warm	Jamie Christian
6	Lawrence	Ramirez	Digital Marketing Manager	Collection Consulting Group	lawrence@collectionconsulting.com	-	-	-	Jamie Christian
7	Martha	Newman	Social Media Marketing Manager	FoodStars.Org	martha.newman@foodstars.org	-	-	Hot	Jamie Christian
8	Kiran	Stefcia	Director of Marketing	Kiran and Co Marketers	kiranstefcia@marketersco.com	-	-	-	Jamie Christian
9	Jay	Farley	Content Marketing Manager	Random Wishes Builders	jayfarley1985@wishes.com	-	-	-	Jamie Christian
10	Danika	Marcia	Junior Marketing Associate	Ted's Toy Shop	danika@tedstoys.com	-	-	-	Jamie Christian

# Task 6: Create Report Charts



*On the following slides, insert screenshots of the charts you just created:*

- **Step 1:** All opportunities of all time that have been “Closed – Won” among new customers, with opportunities grouped by industry
- **Step 2:** All leads of all time that are currently “Working – Contacted”, grouped by lead source
- **Step 3:** Expected revenue of all time for open opportunities where probability is >30%

# Task 6: Create Report Charts



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Opportunities  
**Closed-Won – New Customers by Industry**

Total Records 7 Total Expected Revenue \$1,790,000.00

Report Viewer  
Closed-Won Opportunities by industry

Sum of Expected Revenue

Industry	Sum of Expected Revenue
Apparel	210k
Biotechnology	70k
Education	70k
Electronics	70k
Energy	910k
Hospitality	210k
Transportation	210k

Row Counts Detail Rows Subtotals Grand Total

To Do List

# Task 6: Create Report Charts



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Leads  
**Working – Contacted Leads by Source**

Total Records 12

Working – Contacted Leads by Source

Record Count

Lead Source

Lead Source	First Name	Last Name	Title	Company / Account	Email	Street	Rating	Lead Owner
Web (4)	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcof.net	321 Westcott Building	Hot	OrgFarm EPIC
	Brenda	McClure	CFO	Cadinal Inc.	brenda@cardinal.net	-	-	OrgFarm EPIC

Row Counts Detail Rows Subtotals Grand Total

To Do List

# Task 6: Create Report Charts



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

Report: Opportunities  
**Expected Revenue >30%**

Total Records 10

Record Count

Value Proposition

Id. Decision Makers

Perception Analysis

Proposal/Price Quote

Negotiation/Review

Stage

Enable Field Editing

Report Viewer

Record Count

Stage	Opportunity Owner	Account Name	Opportunity Name	Fiscal Period	Amount	Expected Revenue	Probability (%)	Age	Close Date
Value Proposition (2)	OrgFarm EPIC	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Q2-2015	\$250,000.00	\$125,000.00	50%	21	5/24/2025
	OrgFarm EPIC	Express Logistics and Transport	Express Logistics Portable Truck Generators	Q1-2015	\$80,000.00	\$40,000.00	50%	21	2/16/2025

Row Counts Detail Rows Subtotals Grand Total

To Do List

# Task 7: Create a Dashboard



P A T H S T R E A M

*On the following slide, insert a screenshot of the dashboard you just created.*

# Task 7: Create a Dashboard



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter More

## Copy of Sales Report Dashboard

As of Jun 19, 2025, 10:39 AM · Viewing as Jamie Christian

[Refresh](#) [Edit](#) [Subscribe](#)

**Closed-Won Opportunities by Industry**

Sum of Expected Revenue

Industry	Sum of Expected Revenue
Apparel	\$235k
Biotechnology	\$85k
Education	\$50k
Electronics	\$75k
Energy	\$915k
Hospitality	\$210k
Transportation	\$220k

[View Report \(Closed-Won – New Cust...\)](#) As of Jun 19, 2025, 12:23 PM

**Working Leads by Source**

Record Count

Lead Source	Record Count
Web	4
Phone Inquiry	1
Partner Referral	3
Purchased List	4

[View Report \(Working – Contacted Leads by Source\)](#) As of Jun 19, 2025, 10:39 AM

**Expected Revenue by Stage and Type**

Sum of Expected Revenue

Stage

- Value Proposition
- Id. Decision Makers
- Perception Analysis
- Proposal/Price Quote
- Negotiation/Review

Type	Sum of Expected Revenue
Existing Customer - Upgrade	\$250k
Existing Customer - Replacement	\$50k

dashboard

To Do List

# You have reached the end of this Project!



*This is the end of this Independent Project! Great job completing all these tasks in Salesforce. Make sure you download a copy of this deck for your portfolio.*