PATHSTREAM

Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

Jamie Christian II

Project Overview

1. **Task 1:** Create a Tabular Report
2. **Task 2:** Create a Summary Report
3. **Task 3:** Create a Matrix Report
4. **Task 4:** Business Case Analysis

Project Overview

5 Task 5: Create a New Report

6 Task 6: Create Report Charts

7 Task 7: Create a Dashboard

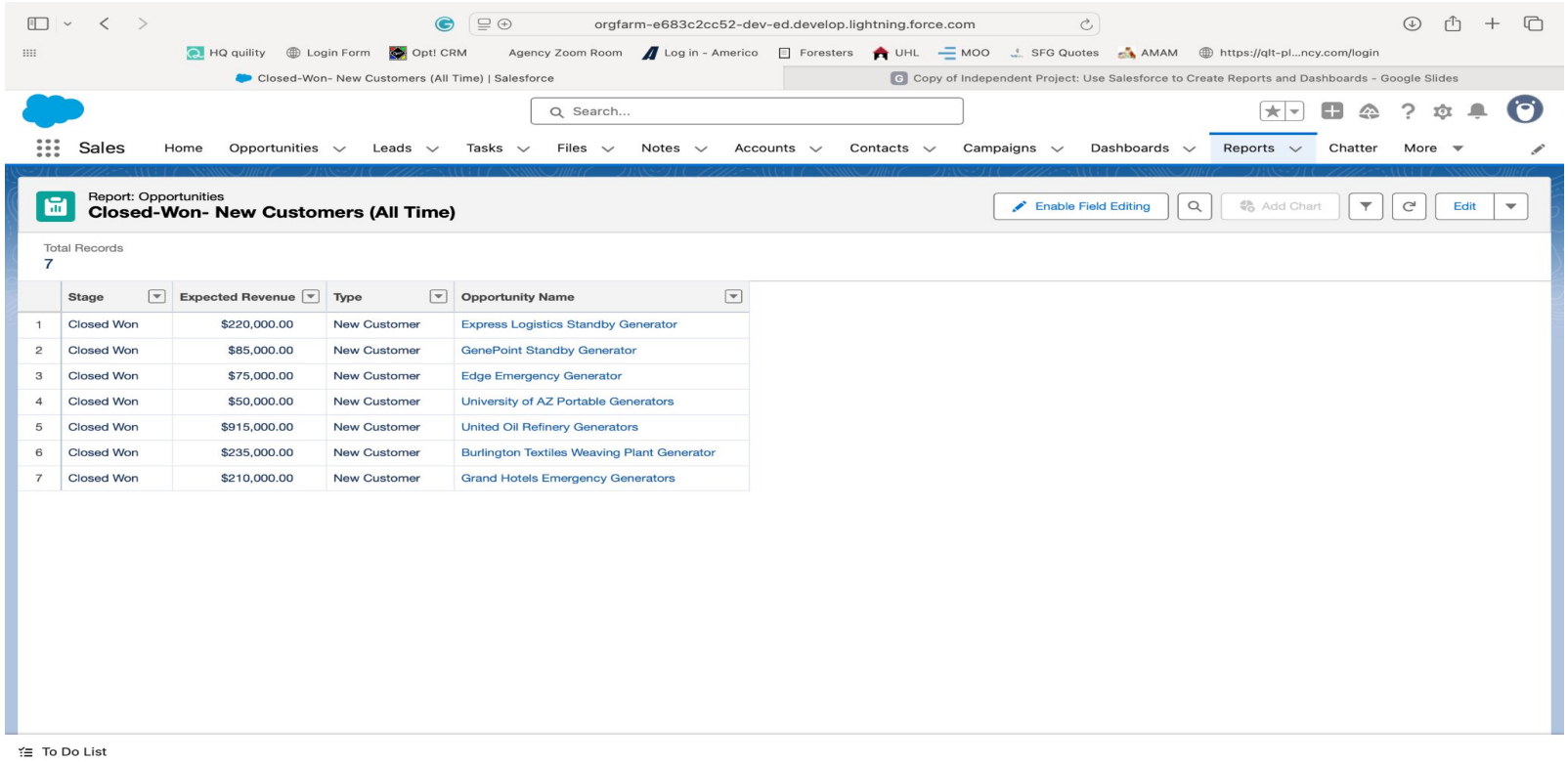
Task 1: Create a Tabular Report

PATHSTREAM

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

Task 1: Create a Tabular Report

PATHSTREAM



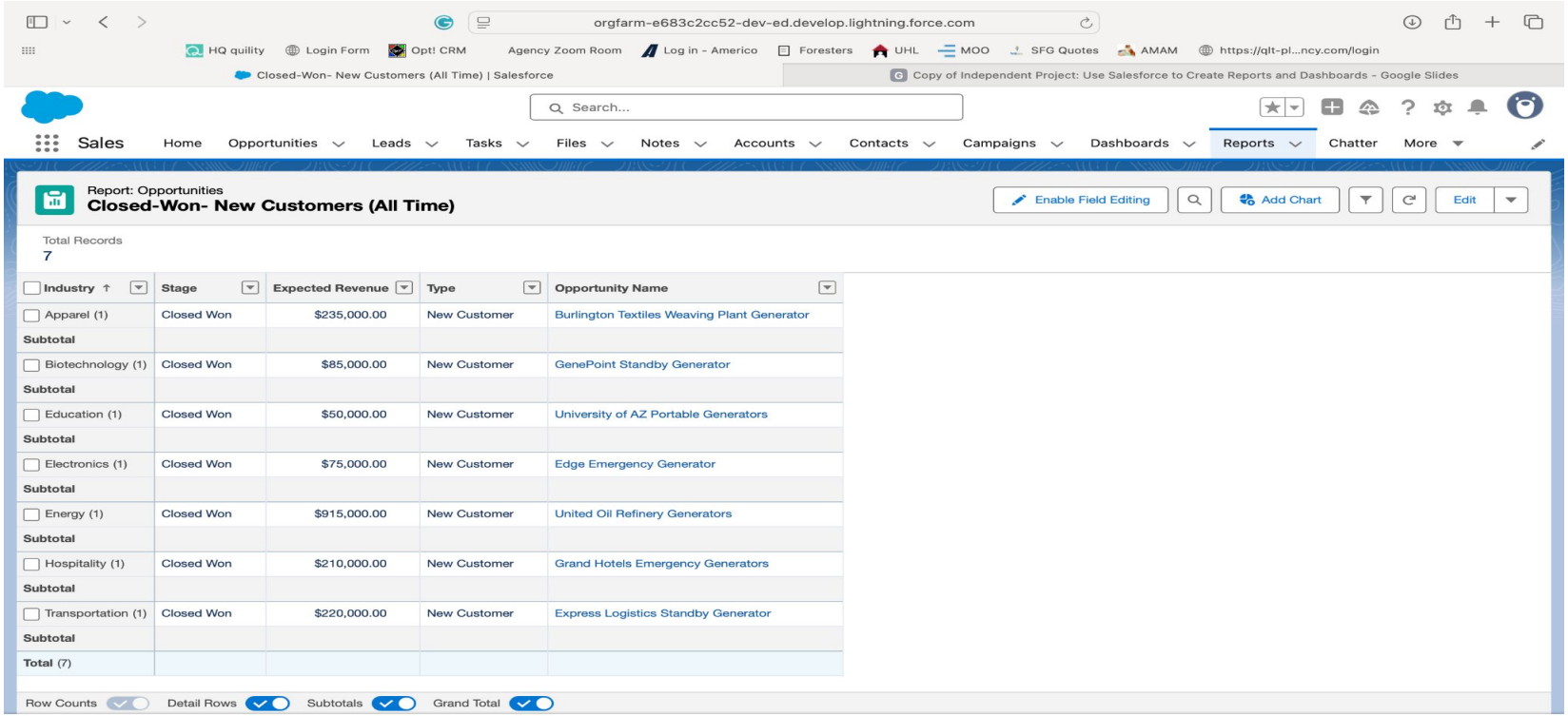
Task 2: Create a Summary Report

PATHSTREAM

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

Task 2: Create a Summary Report

PATHSTREAM



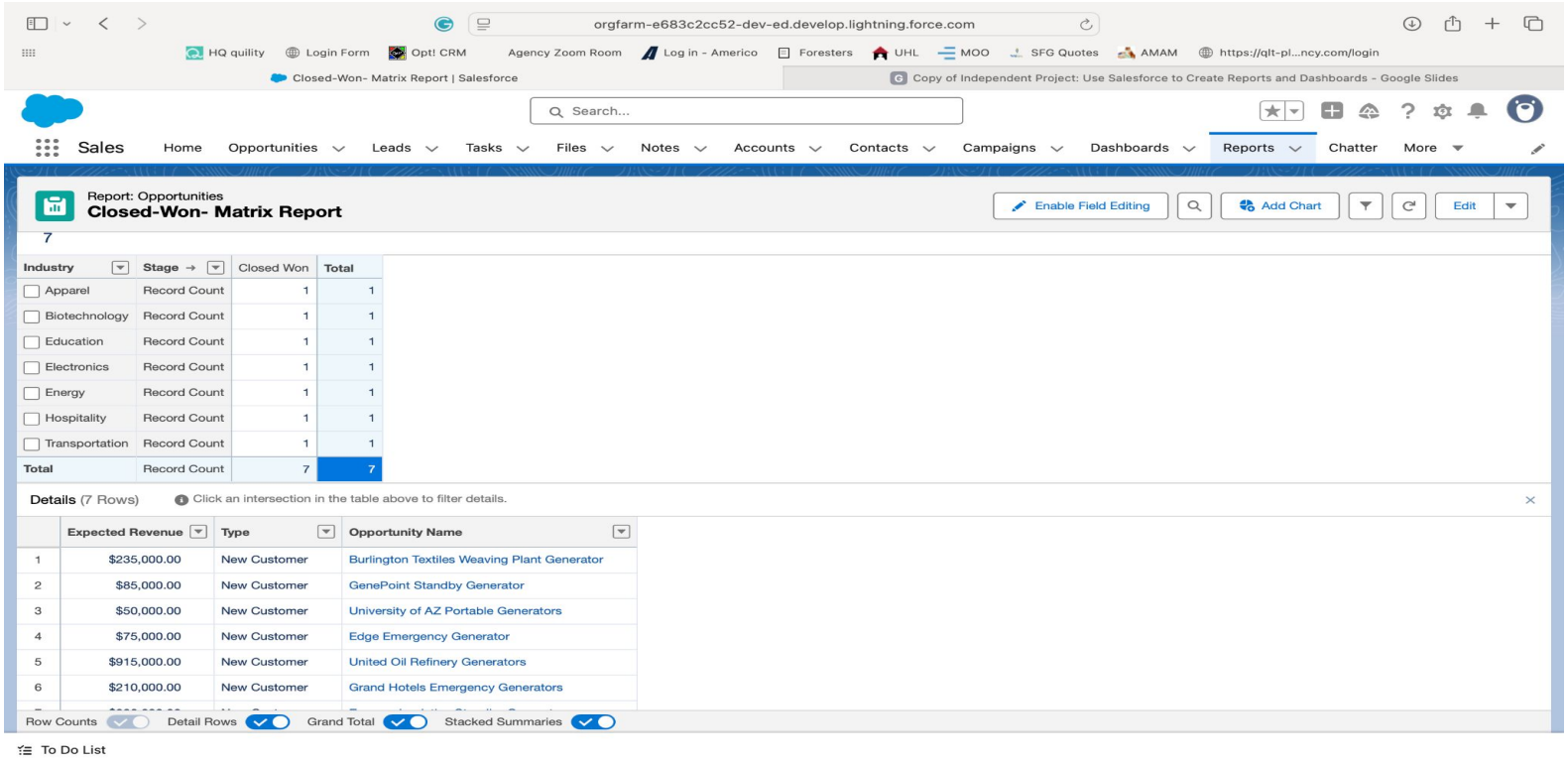
Task 3: Create a Matrix Report

PATHSTREAM

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

Task 3: Create a Matrix Report

PATHSTREAM



Task 4: Business Case Analysis

PATHSTREAM

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

PATHSTREAM

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.

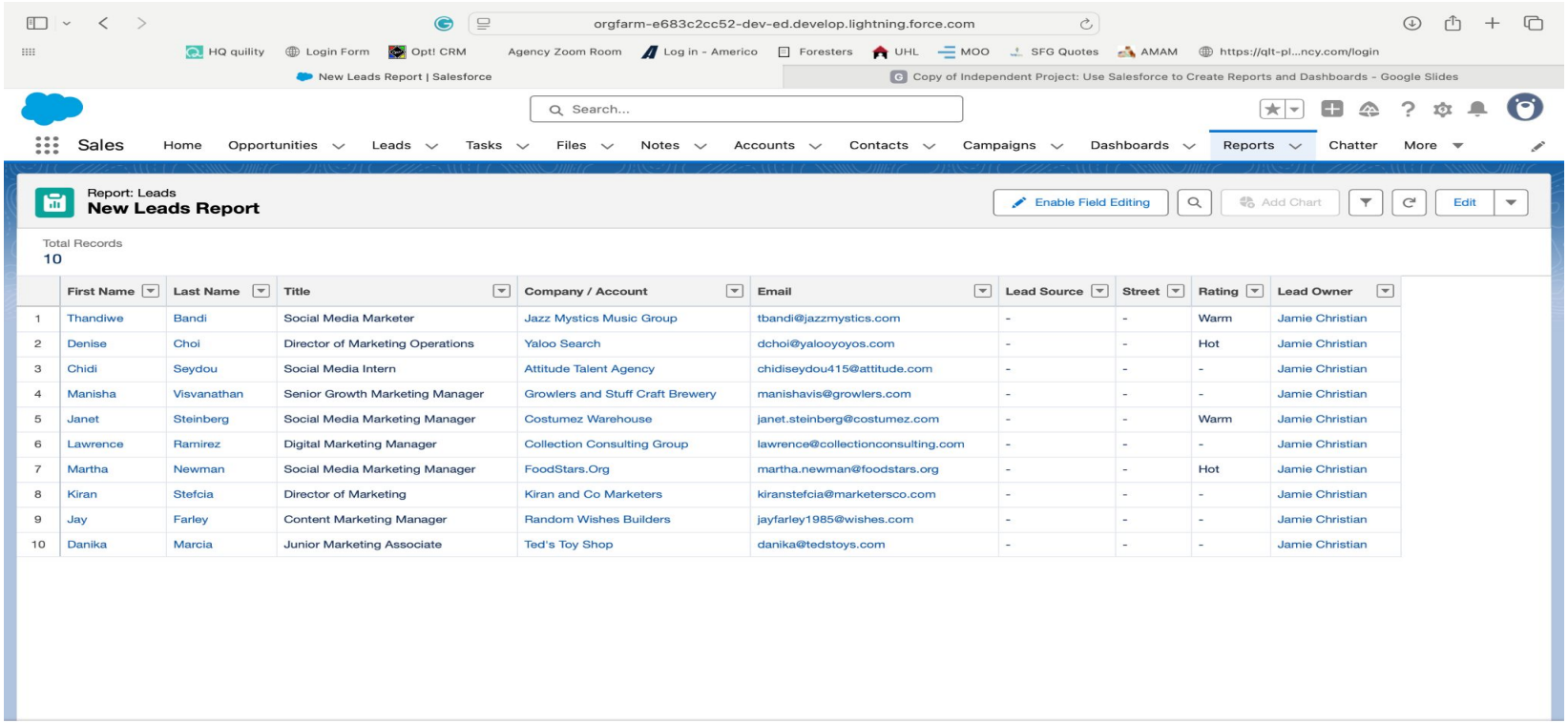
Task 5: Create a New Report

PATHSTREAM

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

Task 5: Create a New Report

PATHSTREAM



	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	Yaloo 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

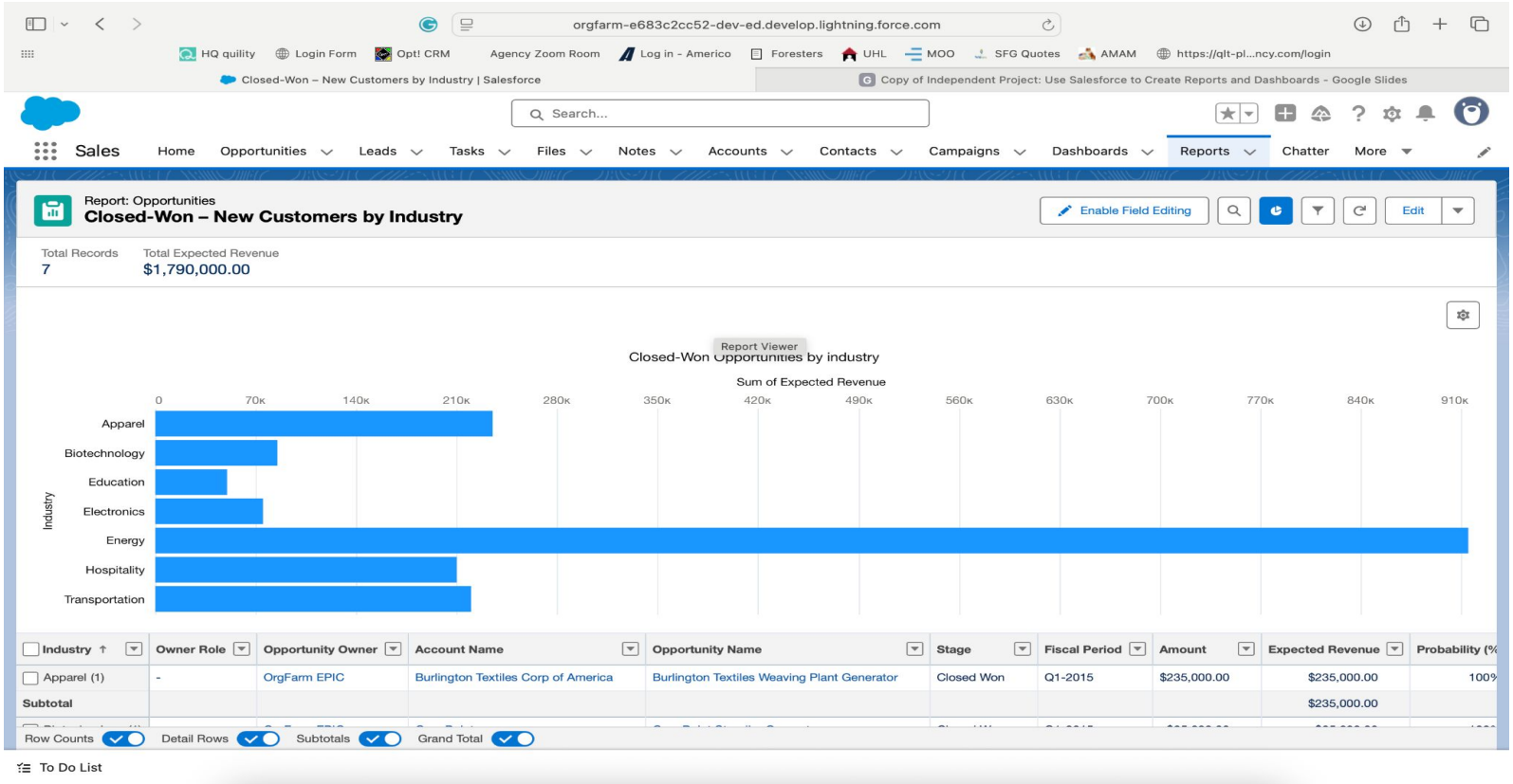
PATHSTREAM

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

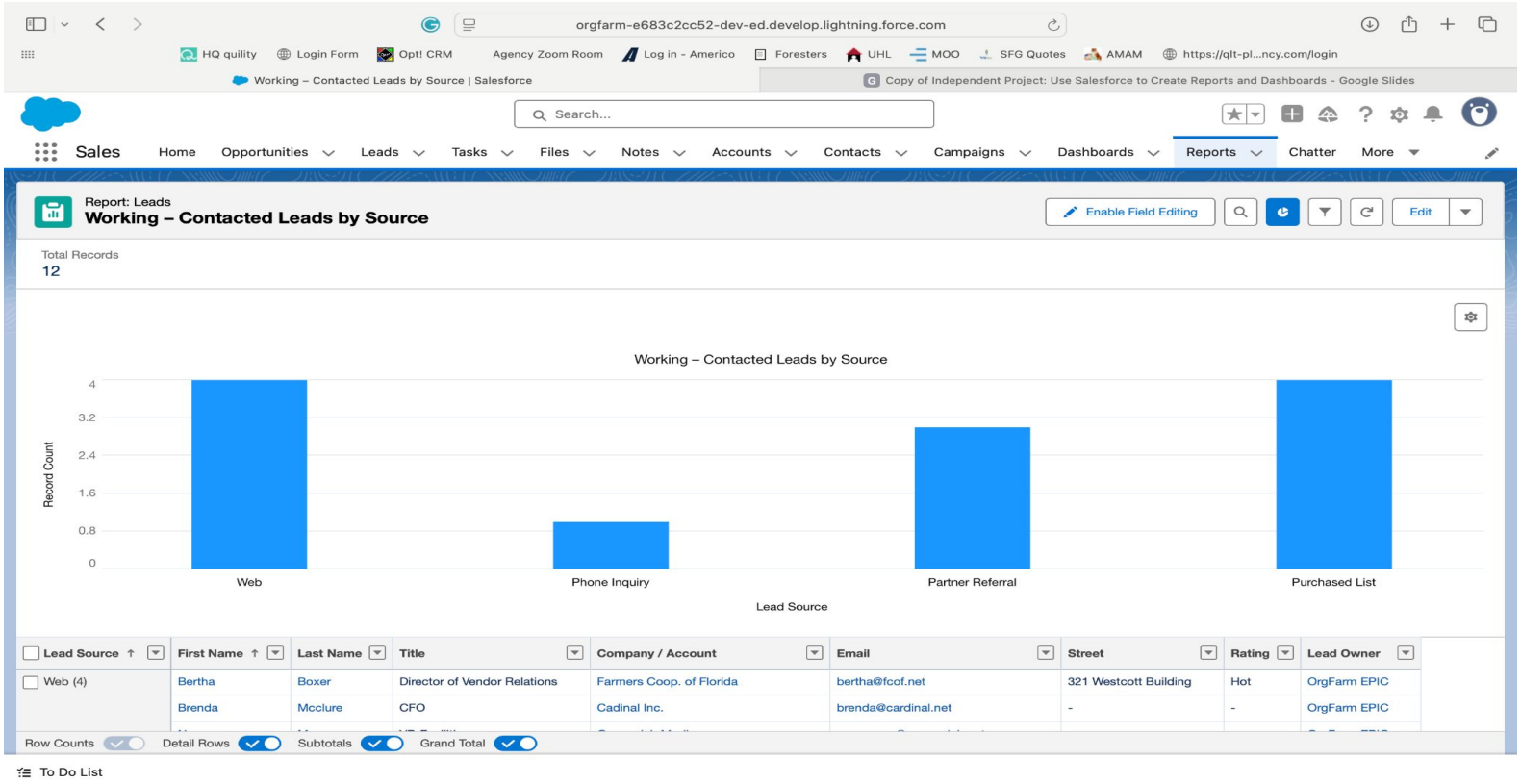
- ***Step 1:*** *All opportunities of all time that have been "Closed — Won" among new customers, with opportunities grouped by industry*
- ***Step 2:*** *All leads of all time that are currently "Working — Contacted", grouped by lead source*
- ***Step 3:*** *Expected revenue of all time for open opportunities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

Task 6: Create Report Charts

PATHSTREAM

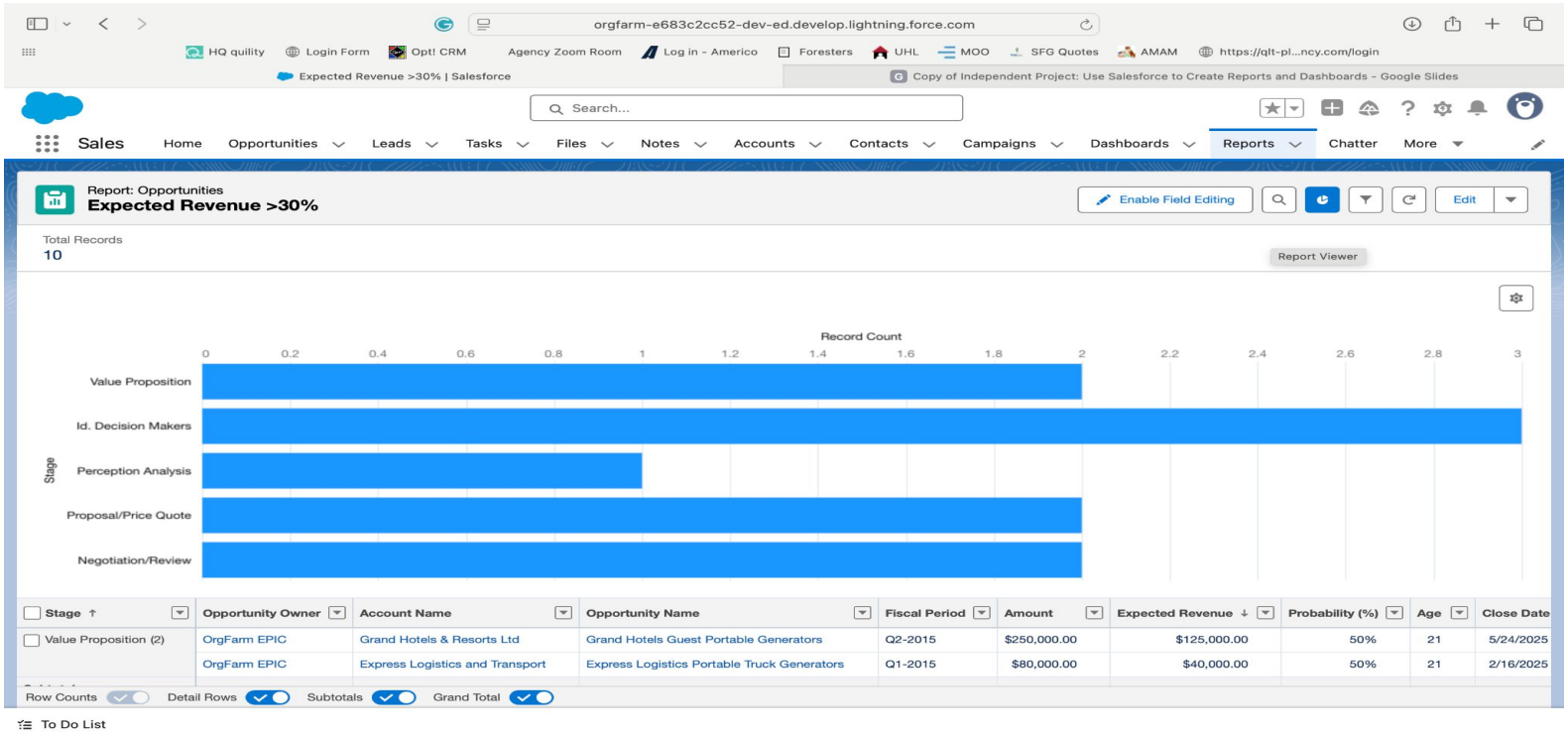


Task 6: Create Report Charts



Task 6: Create Report Charts

PATHSTREAM



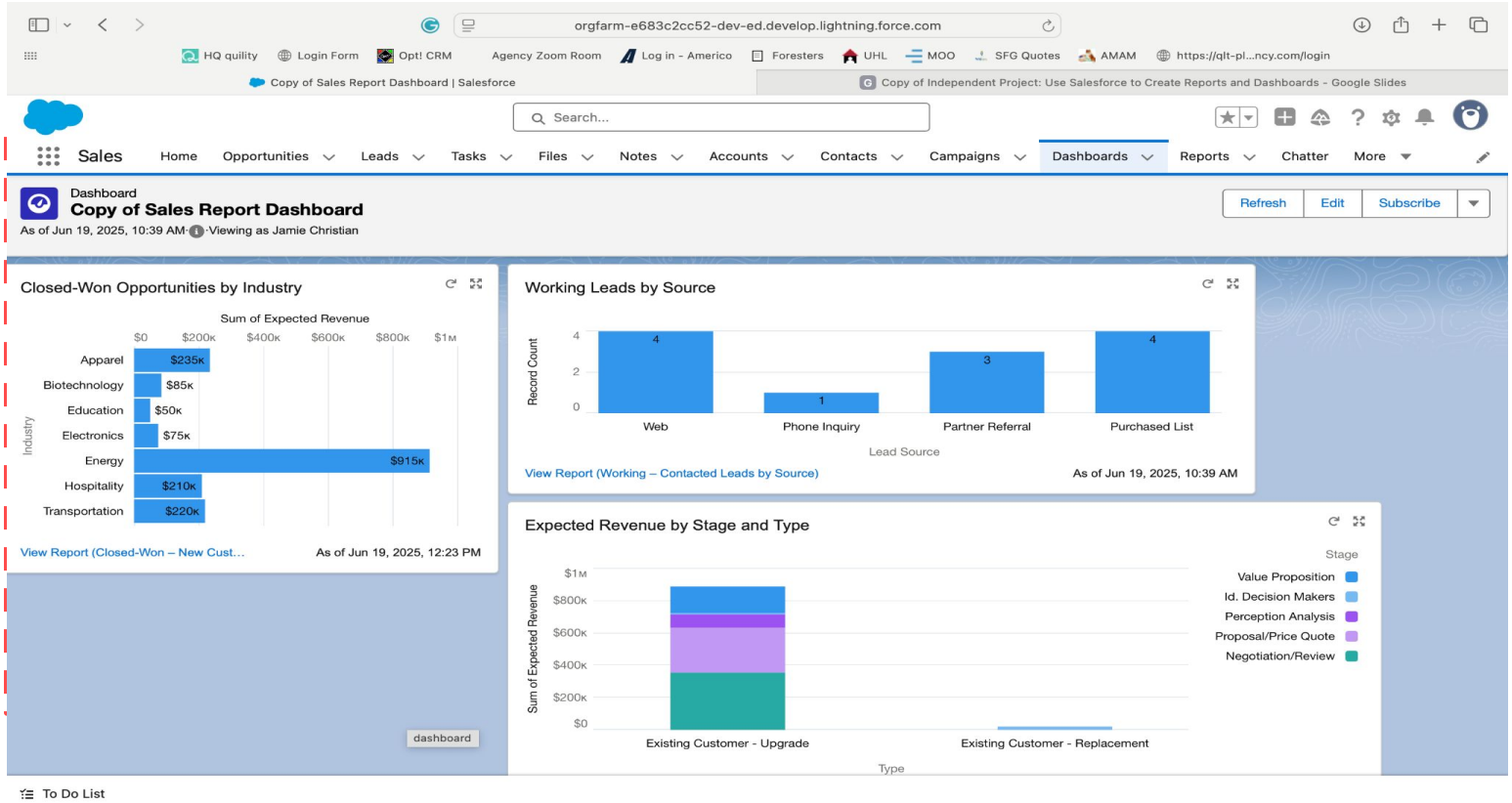
Task 7: Create a Dashboard

PATHSTREAM

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

Task 7: Create a Dashboard

PATHSTREAM



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.