

Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

Jamie Christian II



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Task 1: Create a Tabular Report



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

Task 1: Create a Tabular Report

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Closed-Won- New Customers (All Time) | Salesforce

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

Enable Field Editing

Add Chart

Edit

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

Task 2: Create a Summary Report



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)

Enable Field Editing Add Chart Edit

Total Records
7

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

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

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Closed-Won- Matrix Report | Salesforce

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Report: Opportunities
Closed-Won- Matrix Report

Enable Field Editing Add Chart Filter Refresh Edit

7

Industry	Stage →	Closed Won	Total
<input type="checkbox"/> Apparel	Record Count	1	1
<input type="checkbox"/> Biotechnology	Record Count	1	1
<input type="checkbox"/> Education	Record Count	1	1
<input type="checkbox"/> Electronics	Record Count	1	1
<input type="checkbox"/> Energy	Record Count	1	1
<input type="checkbox"/> Hospitality	Record Count	1	1
<input type="checkbox"/> Transportation	Record Count	1	1
Total	Record Count	7	7

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

Task 4: Business Case Analysis

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

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



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

Task 5: Create a New Report

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New Leads Report | Salesforce

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Report: Leads
New Leads Report

Enable Field Editing Add Chart Edit

Total Records
10

	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@yaloooyoyos.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

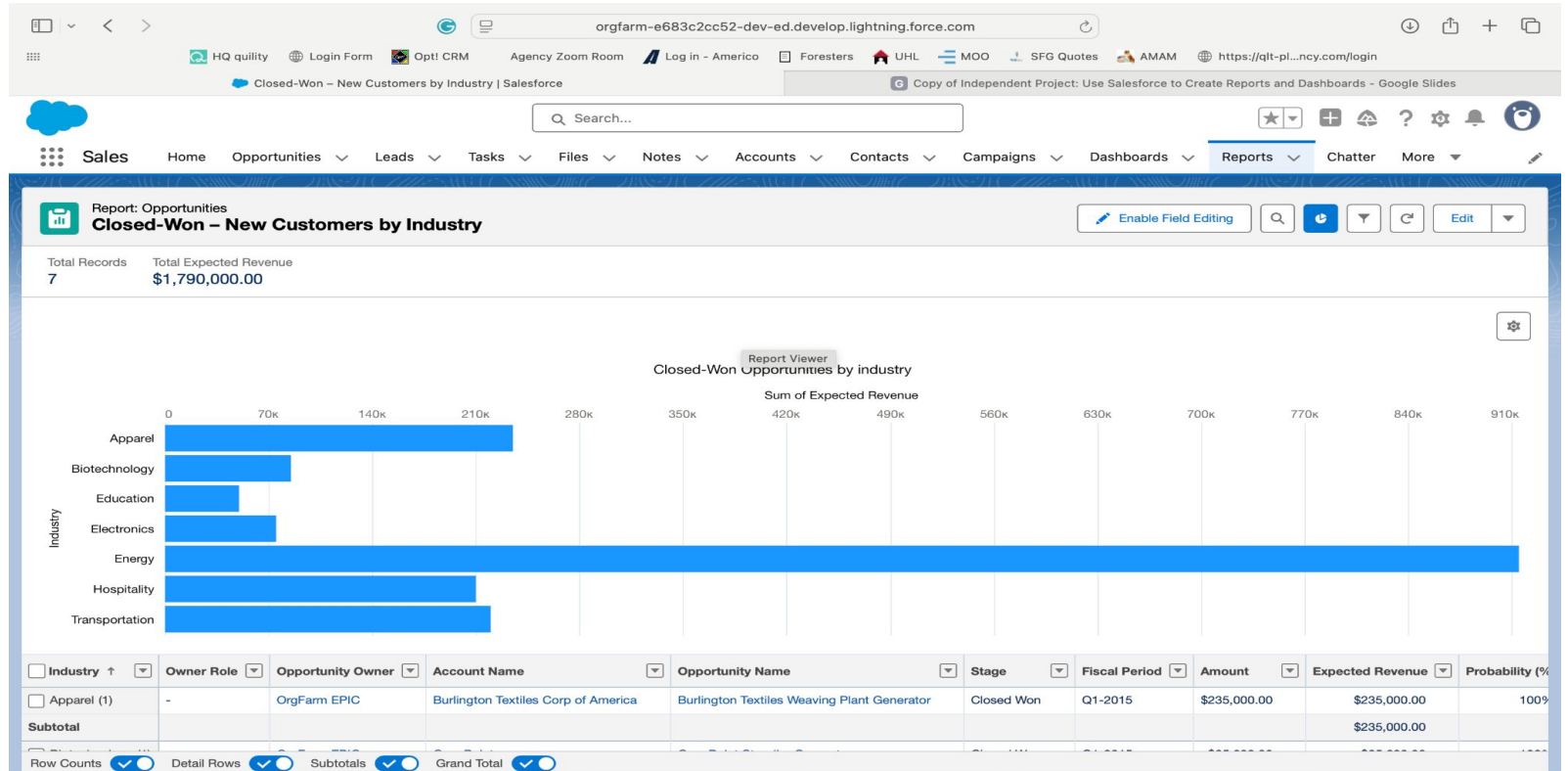
On the following slides, insert screenshots of the charts you just created:

- *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%*

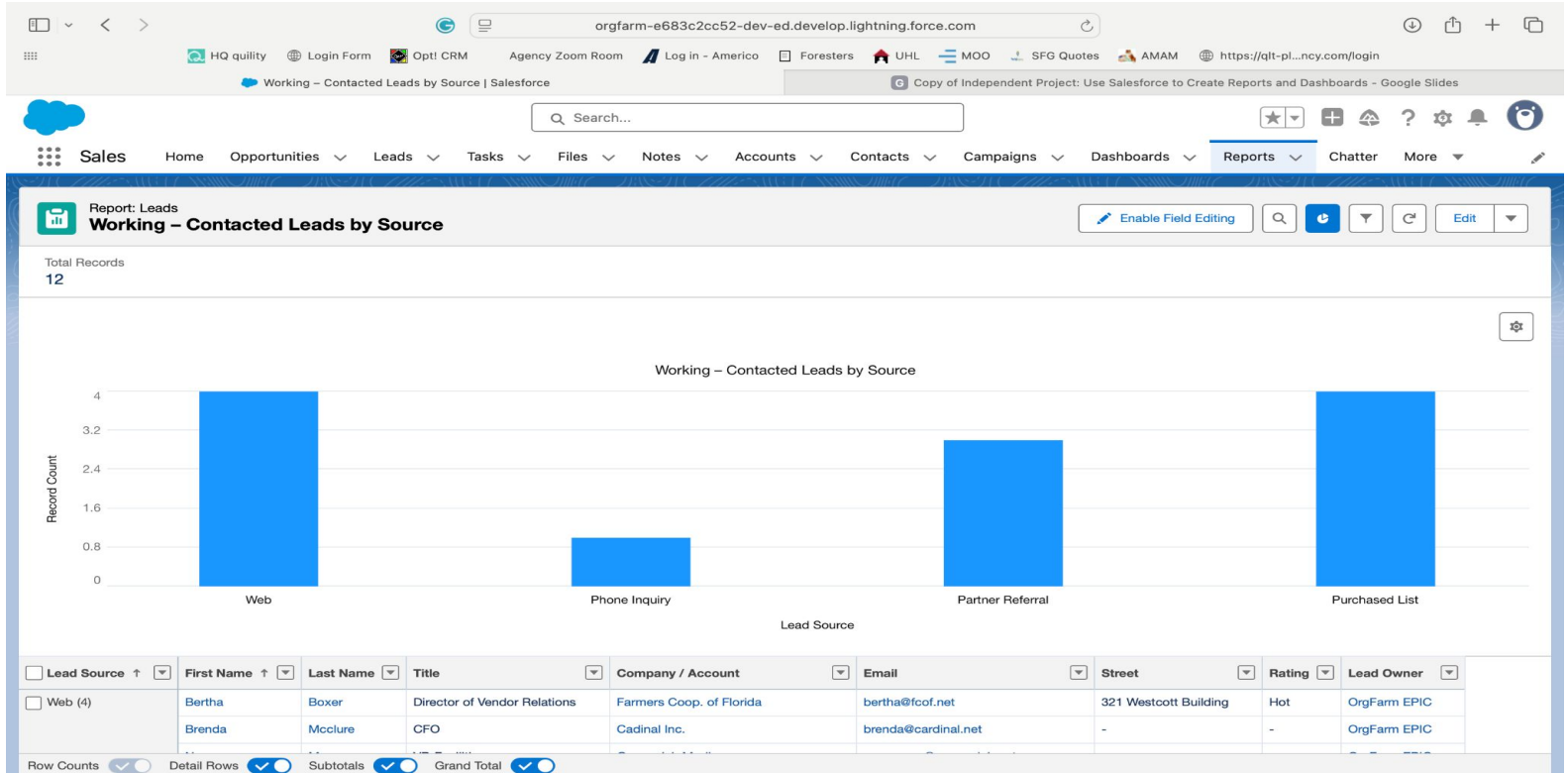
Task 6: Create Report Charts



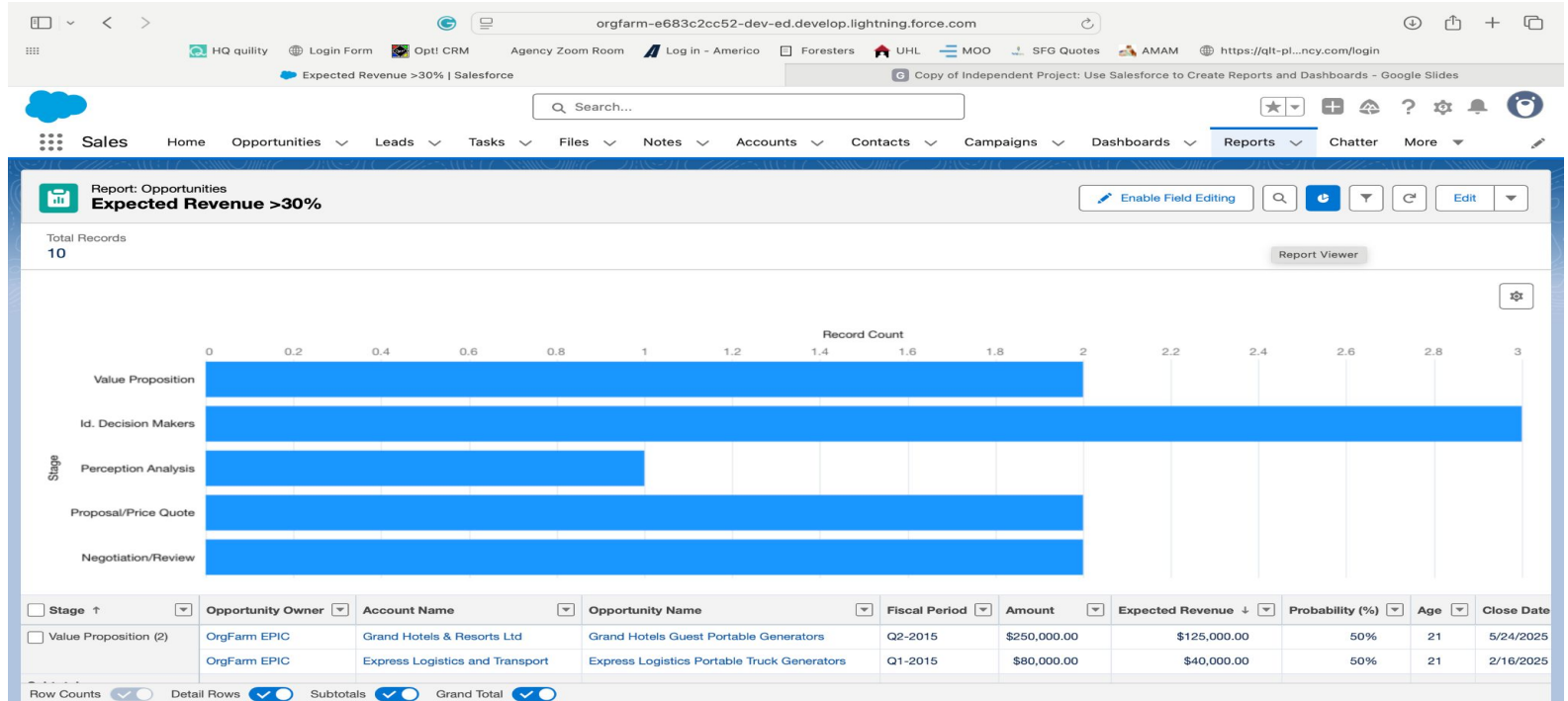
PATHSTREAM



Task 6: Create Report Charts



Task 6: Create Report Charts



Task 7: Create a Dashboard

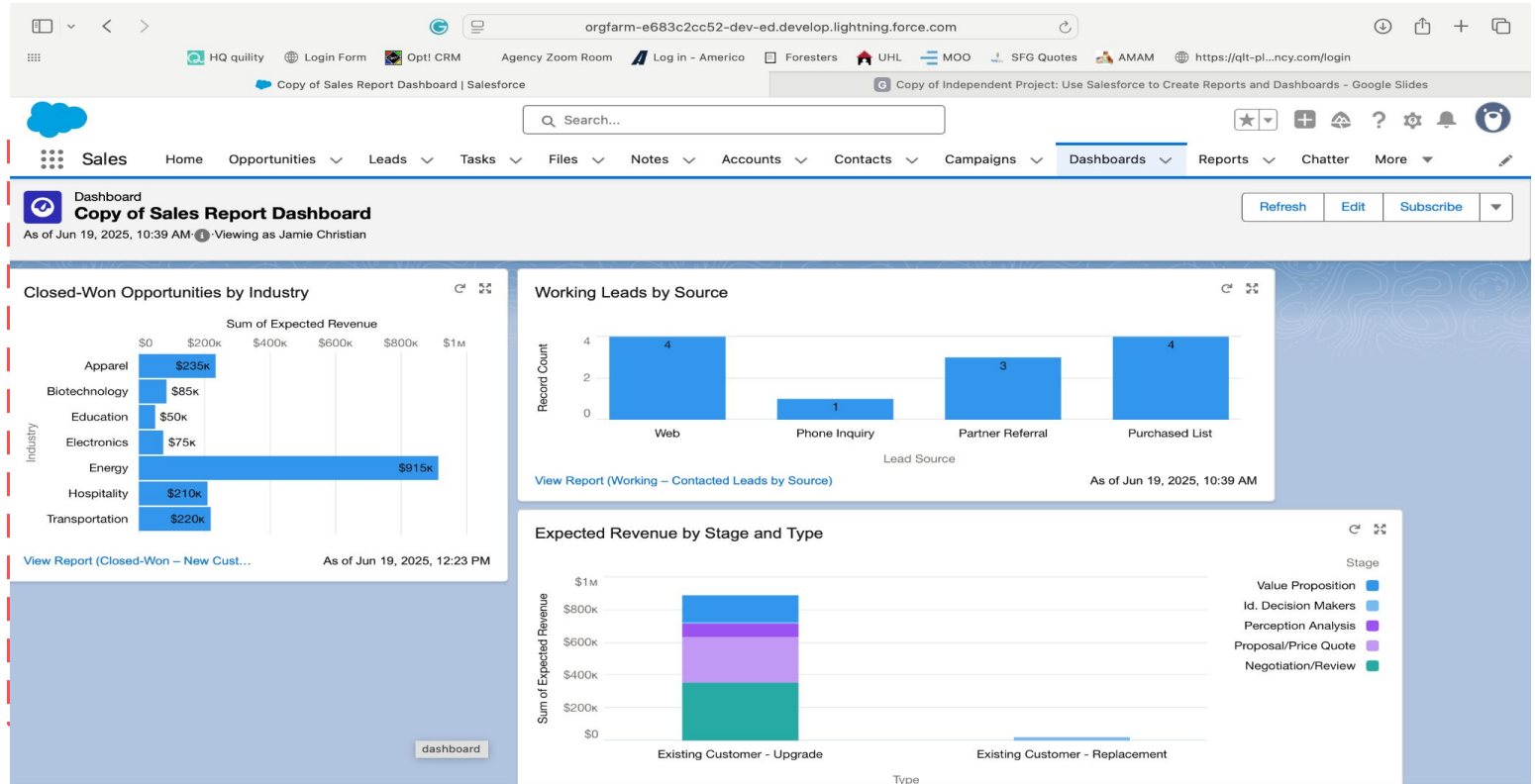


On the following slide, insert a screenshot of the dashboard you just created.

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.