

Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

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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



Browser tabs: All Closed Won Opp. With New Customer

Address bar: brave-raccoon-ol08w2-dev-ed.trailblaze.lightning.force.com/lightning/r/...

Search bar: Search...

Navigation menu: Sales, Home, Opportunities, Leads, Files, Tasks, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Report: Opportunities
All Closed Won Opp. With New Customer
All the new customers to whom their opportunity closed won.

Enable Field Editing, Add Chart, Edit

Total Records: 5

	Opportunity Name	Stage	Expected Revenue	Type
1	Express Logistics Standby Generator	Closed Won	Rs 220,000.00	New Customer
2	GenePoint Standby Generator	Closed Won	Rs 85,000.00	New Customer
3	University of AZ Portable Generators	Closed Won	Rs 50,000.00	New Customer
4	United Oil Refinery Generators	Closed Won	Rs 915,000.00	New Customer
5	Grand Hotels Emergency Generators	Closed Won	Rs 210,000.00	New Customer

Activate Windows
Go to Settings to activate Windows.

To Do List

Type here to search

System tray: 8°C Fog, 11:12 PM, 1/5/2024

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



Report: Leads

Leads with Working-Contacted

All the leads with working contacted

Total Records

13

<input type="checkbox"/> Lead Source ↑ ▾	First Name ▾	Last Name ▾	Company / Account ▾	Lead Status ▾
<input type="checkbox"/> - (1)	Shelley	Major	Major Components	Working - Contacted
Subtotal				
<input type="checkbox"/> Web (4)	Bertha	Boxer	Farmers Coop. of Florida	Working - Contacted
	Brenda	Mcclure	Cadinal Inc.	Working - Contacted
	Tom	James	Delphi Chemicals	Working - Contacted
	Norm	May	Greenwich Media	Working - Contacted
Subtotal				
<input type="checkbox"/> Phone Inquiry (1)	Violet	Macleod	Emerson Transport	Working - Contacted
Subtotal				
<input type="checkbox"/> Partner Referral (4)	Hussain	Raza	abc	Working - Contacted
Row Counts <input checked="" type="checkbox"/> Detail Rows <input checked="" type="checkbox"/> Subtotals <input checked="" type="checkbox"/> Grand Total <input checked="" type="checkbox"/>				

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



Report: Opportunities

All Opp. with prob. greater than 30%

Enable Field Editing

All the opp. with probability greater than 30% and summarized with expected revenue and grouped by stage(column) and type(rows).

Total Records Total Expected Revenue Average Expected Revenue
37 Rs 4,755,744.00 Rs 128,533.62

Type	Stage →	Value Proposition	Id. Decision Makers	Perception Analysis	Proposal/Price Quote	Negotiation/Review	Closed Won	Total
<input type="checkbox"/> -	Sum of Expected Revenue Average Expected Revenue Record Count	Rs 34.00 Rs 34.00 1	Rs 36,450.00 Rs 36,450.00 1	Rs 0.00 Rs 0.00 0	Rs 107,602.50 Rs 26,900.63 4	Rs 0.00 Rs 0.00 0	Rs 1,282.50 Rs 1,282.50 1	Rs 145,369.00 Rs 20,767.00 7
<input type="checkbox"/> Existing Customer - Upgrade	Sum of Expected Revenue Average Expected Revenue Record Count	Rs 165,000.00 Rs 82,500.00 2	Rs 9,000.00 Rs 9,000.00 1	Rs 84,000.00 Rs 84,000.00 1	Rs 277,500.00 Rs 138,750.00 2	Rs 355,500.00 Rs 177,750.00 2	Rs 1,903,000.00 Rs 173,000.00 11	Rs 2,794,000.00 Rs 147,052.63 19
<input type="checkbox"/> Existing Customer - Replacement	Sum of Expected Revenue Average Expected Revenue Record Count	Rs 0.00 Rs 0.00 0	Rs 21,000.00 Rs 21,000.00 1	Rs 0.00 Rs 0.00 0	Rs 0.00 Rs 0.00 0	Rs 0.00 Rs 0.00 0	Rs 0.00 Rs 0.00 0	Rs 21,000.00 Rs 21,000.00 1
<input type="checkbox"/> New Customer	Sum of Expected Revenue Average Expected Revenue Record Count	Rs 0.00 Rs 0.00 1	Rs 0.00 Rs 0.00 0	Rs 0.00 Rs 0.00 0	Rs 306,375.00 Rs 102,125.00 3	Rs 9,000.00 Rs 9,000.00 1	Rs 1,480,000.00 Rs 296,000.00 5	Rs 1,795,375.00 Rs 179,537.50 10
Total	Sum of Expected Revenue Average Expected Revenue Record Count	Rs 165,034.00 Rs 41,258.50 4	Rs 66,450.00 Rs 22,150.00 3	Rs 84,000.00 Rs 84,000.00 1	Rs 691,477.50 Rs 76,830.83 9	Rs 364,500.00 Rs 121,500.00 3	Rs 3,384,282.50 Rs 199,075.44 17	Rs 4,755,744.00 Rs 128,533.62 37

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

Type out your response to the prompt on the previous slide here.

- . Report is the conclusion of any data which make it easy to see the big picture smartly and vigilantly.
- . Filters used to find out the required results.
- . Define the records and fields available to a report based on the objects from which you choose to display the data.
- . Define the prerequisites of report thats called requirement of the report "Why report needed"? Then goes to report and click the new report button and select the type of report and start to make the report.
- . SimplySocial company will use the reports to track the record of their business and find out the improvement and forecast for the future decision.

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



Browser tabs: Closed Won Opp. New Cust grp

Address bar: brave-raccoon-ol08w2-dev-ed.trailblaze.lightning.force.com/lightning/r/...

Search bar: Search...

Navigation menu: Sales, Home, Opportunities, Leads, Files, Tasks, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Report: Opportunities
Closed Won Opp. New Cust grp industry.
All the new customers to whom their opportunity closed won.

Buttons: Enable Field Editing, Add Chart, Edit

Total Records: 5

Industry	Opportunity Name	Stage	Expected Revenue	Type
Biotechnology (1)	GenePoint Standby Generator	Closed Won	Rs 85,000.00	New Customer
Education (1)	University of AZ Portable Generators	Closed Won	Rs 50,000.00	New Customer
Energy (1)	United Oil Refinery Generators	Closed Won	Rs 915,000.00	New Customer
Hospitality (1)	Grand Hotels Emergency Generators	Closed Won	Rs 210,000.00	New Customer
Transportation (1)	Express Logistics Standby Generator	Closed Won	Rs 220,000.00	New Customer
Total (5)				

Row Counts: ☒ Row Counts ☒ Detail Rows ☐ Subtotals ☒ Grand Total

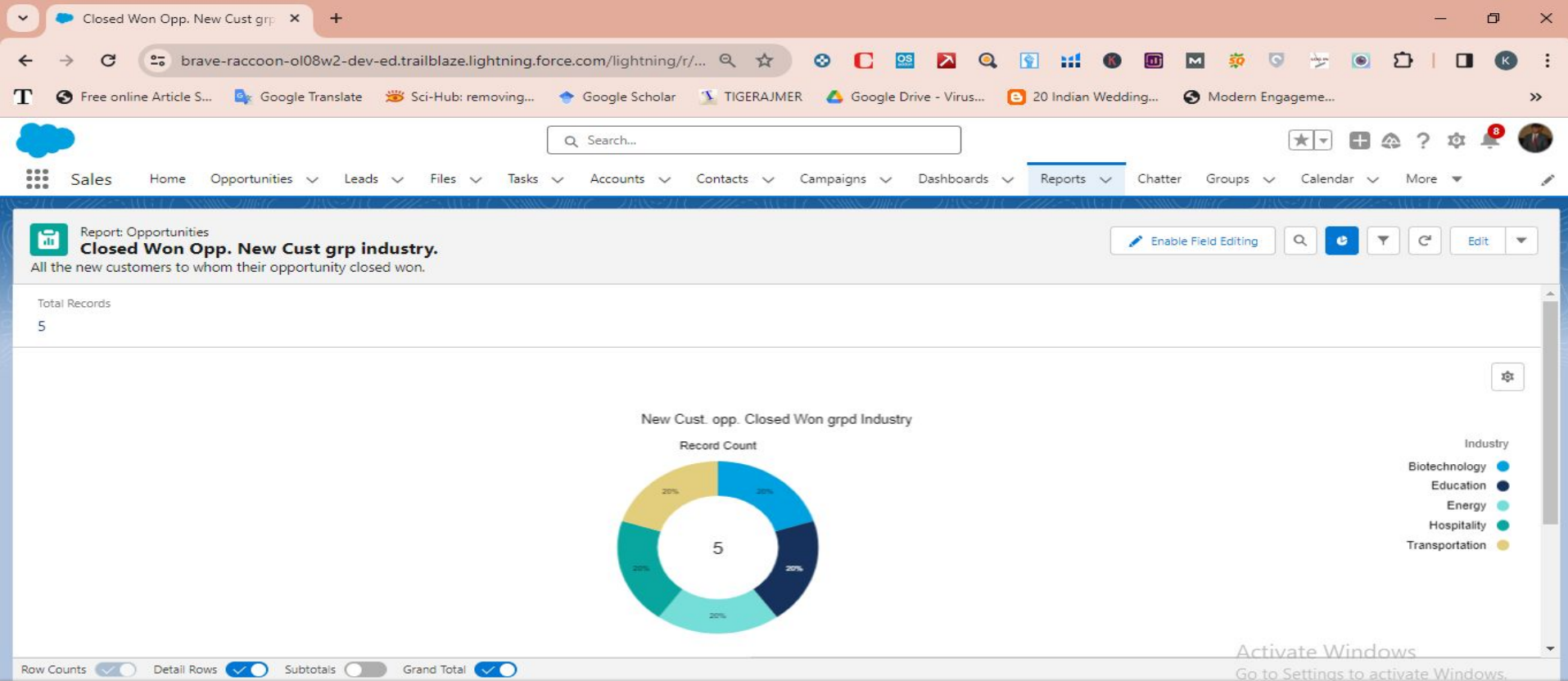
Activate Windows
Go to Settings to activate Windows.

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%*

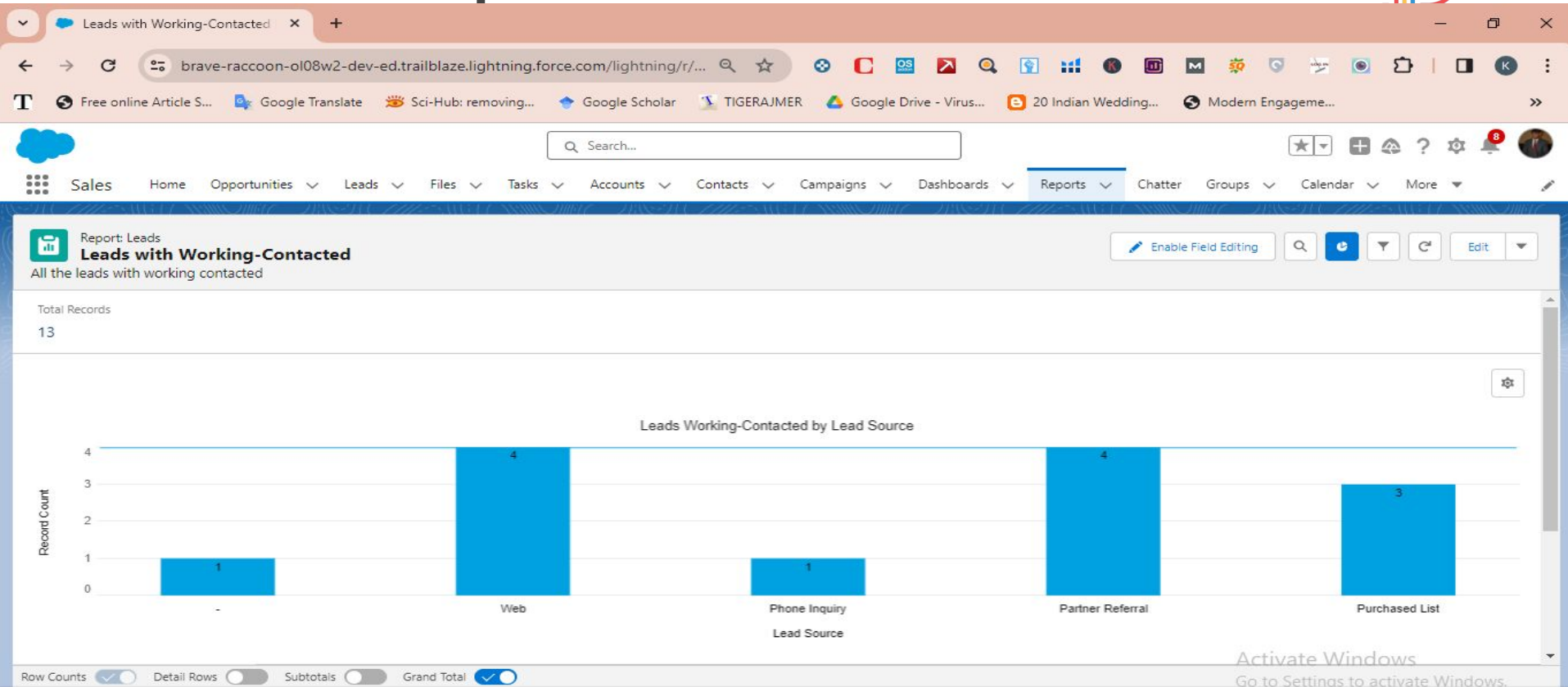
Task 6: Create Report Charts



Activate Windows
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To Do List

Task 6: Create Report Charts



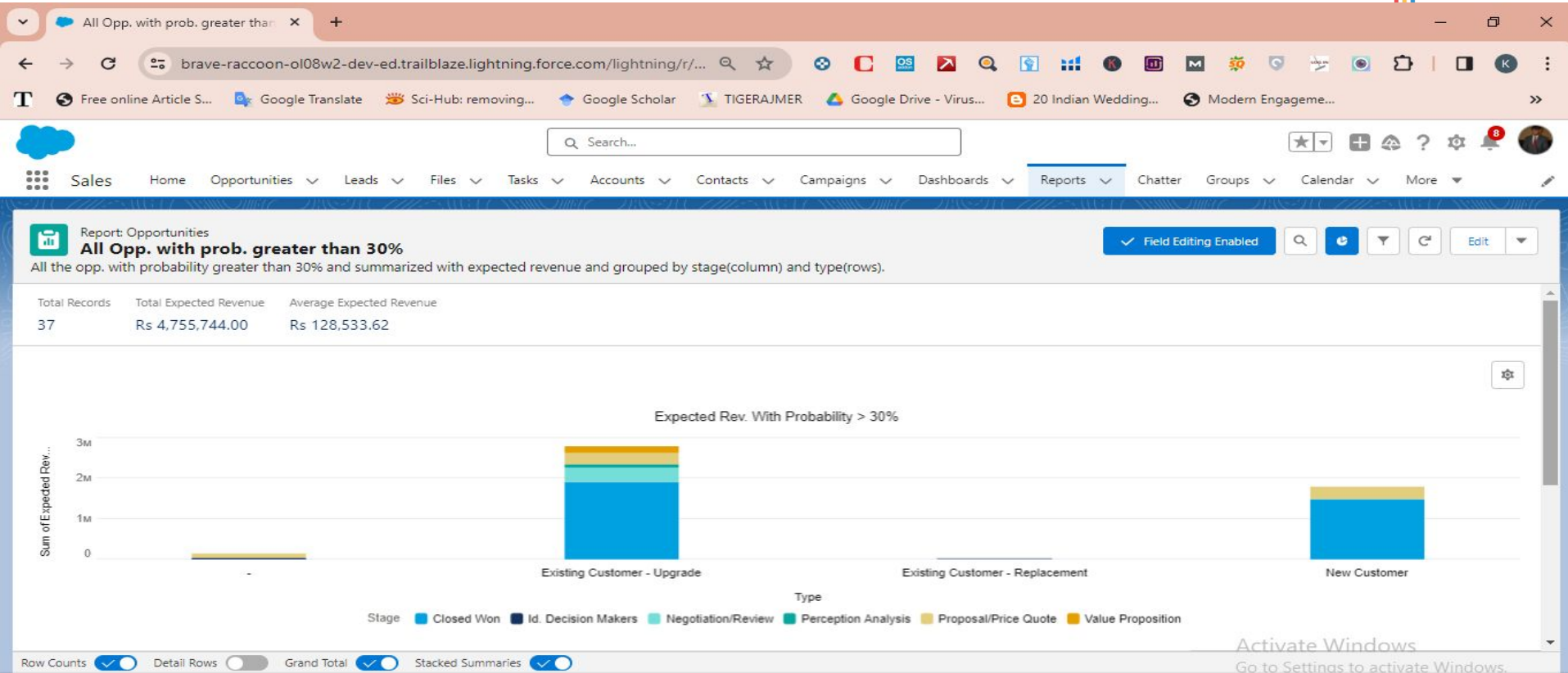
To Do List

Type here to search



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Task 6: Create Report Charts



Activate Windows
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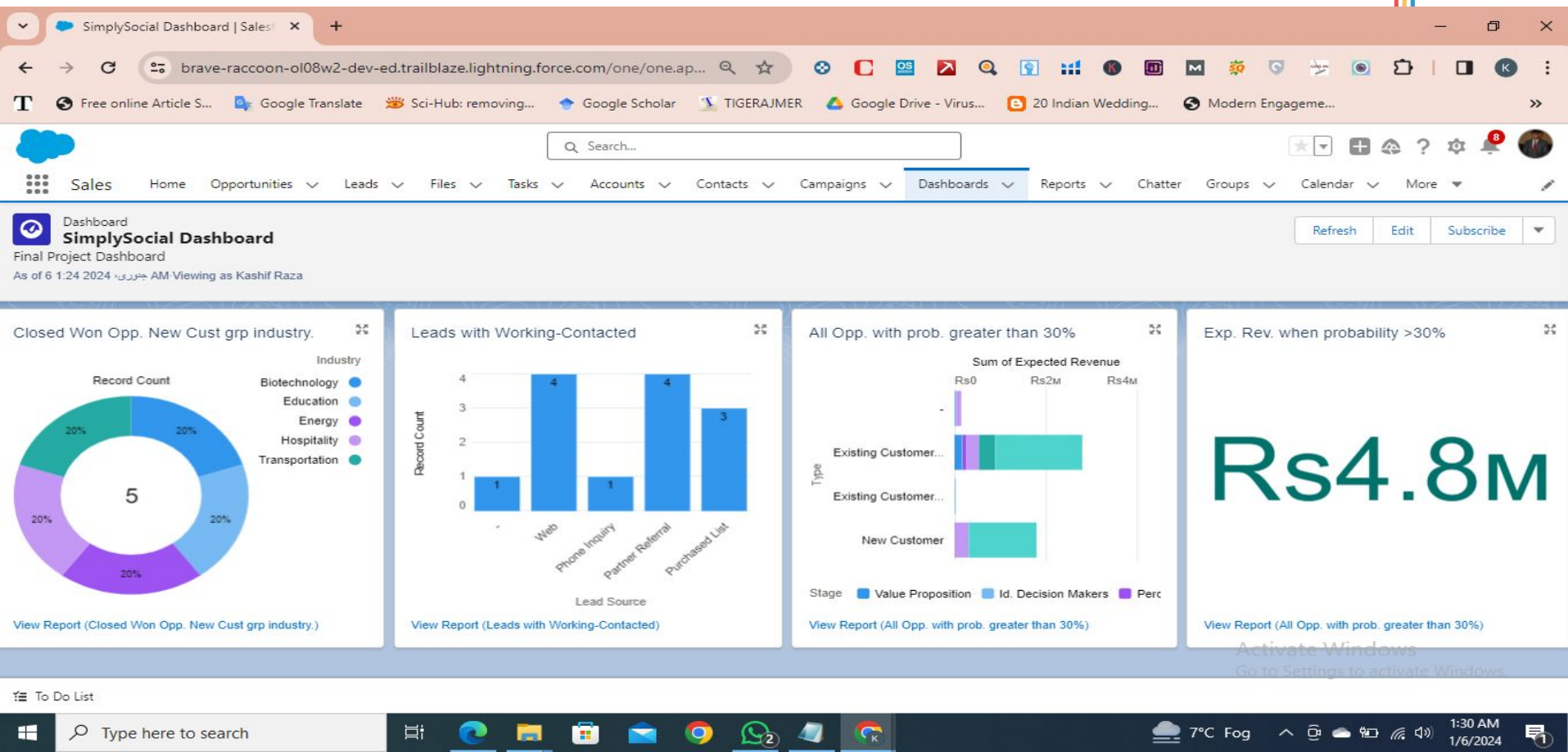
To Do List

Task 7: Create a Dashboard



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

Task 7: Create a Dashboard



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.