PATHSTREAM

Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

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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

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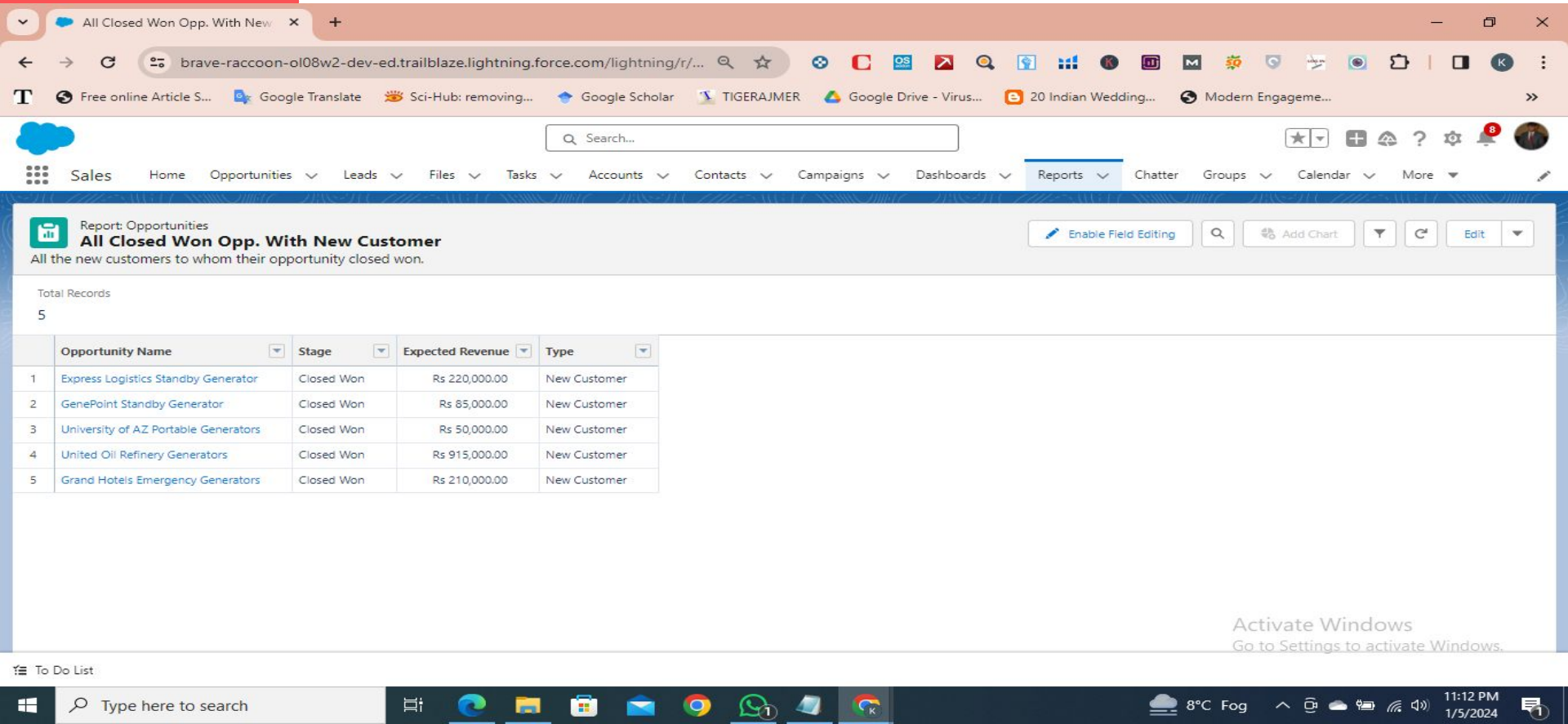
On the following slide, insert a screenshot of the tabular report you just created and ran.

Task 1: Create a Tabular Report



Task 2: Create a Summary Report

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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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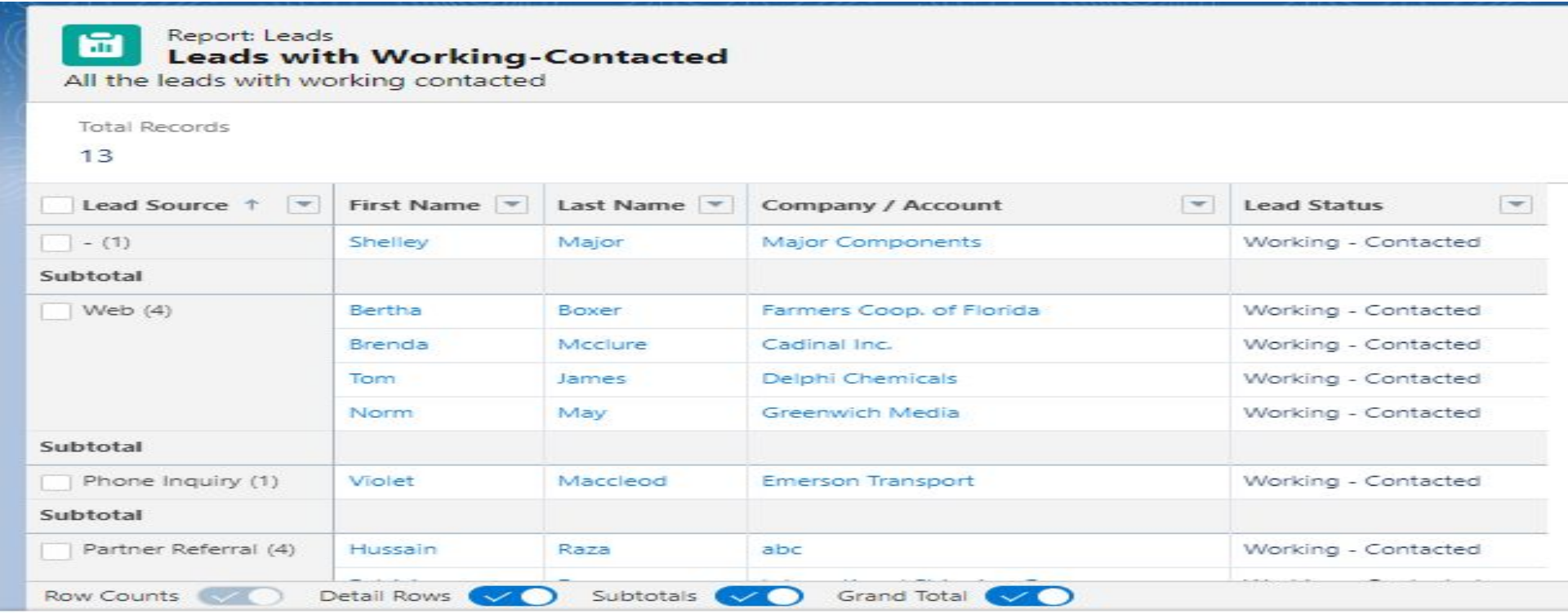

Report: Leads

Leads with Working-Contacted

All the leads with working contacted

Total Records

13

Lead Source	First Name	Last Name	Company / Account	Lead Status
- (1)	Shelley	Major	Major Components	Working - Contacted
Subtotal				
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				
Phone Inquiry (1)	Violet	Maccleod	Emerson Transport	Working - Contacted
Subtotal				
Partner Referral (4)	Hussain	Raza	abc	Working - Contacted

Row Counts Detail Rows Subtotals Grand Total

To Do List

Task 3: Create a Matrix Report

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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%

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

Enable Field Editing

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
-	Sum of Expected Revenue	Rs 34.00	Rs 36,450.00	Rs 0.00	Rs 107,602.50	Rs 0.00	Rs 1,282.50	Rs 145,369.00
	Average Expected Revenue	Rs 34.00	Rs 36,450.00	Rs 0.00	Rs 26,900.63	Rs 0.00	Rs 1,282.50	Rs 20,767.00
	Record Count	1	1	0	4	0	1	7
Existing Customer - Upgrade	Sum of Expected Revenue	Rs 165,000.00	Rs 9,000.00	Rs 84,000.00	Rs 277,500.00	Rs 355,500.00	Rs 1,903,000.00	Rs 2,794,000.00
	Average Expected Revenue	Rs 82,500.00	Rs 9,000.00	Rs 84,000.00	Rs 138,750.00	Rs 177,750.00	Rs 173,000.00	Rs 147,052.63
	Record Count	2	1	1	2	2	11	19
Existing Customer - Replacement	Sum of Expected Revenue	Rs 0.00	Rs 21,000.00	Rs 0.00	Rs 0.00	Rs 0.00	Rs 0.00	Rs 21,000.00
	Average Expected Revenue	Rs 0.00	Rs 21,000.00	Rs 0.00	Rs 0.00	Rs 0.00	Rs 0.00	Rs 21,000.00
	Record Count	0	1	0	0	0	0	1
New Customer	Sum of Expected Revenue	Rs 0.00	Rs 0.00	Rs 0.00	Rs 306,375.00	Rs 9,000.00	Rs 1,480,000.00	Rs 1,795,375.00
	Average Expected Revenue	Rs 0.00	Rs 0.00	Rs 0.00	Rs 102,125.00	Rs 9,000.00	Rs 296,000.00	Rs 179,537.50
	Record Count	1	0	0	3	1	5	10
Total	Sum of Expected Revenue	Rs 165,034.00	Rs 66,450.00	Rs 84,000.00	Rs 691,477.50	Rs 364,500.00	Rs 3,384,282.50	Rs 4,755,744.00
	Average Expected Revenue	Rs 41,258.50	Rs 22,150.00	Rs 84,000.00	Rs 76,830.83	Rs 121,500.00	Rs 199,075.44	Rs 128,533.62
	Record Count	4	3	1	9	3	17	37

Row Counts Detail Rows Grand Total Stacked Summaries

To Do List

Task 4: Business Case Analysis

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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

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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

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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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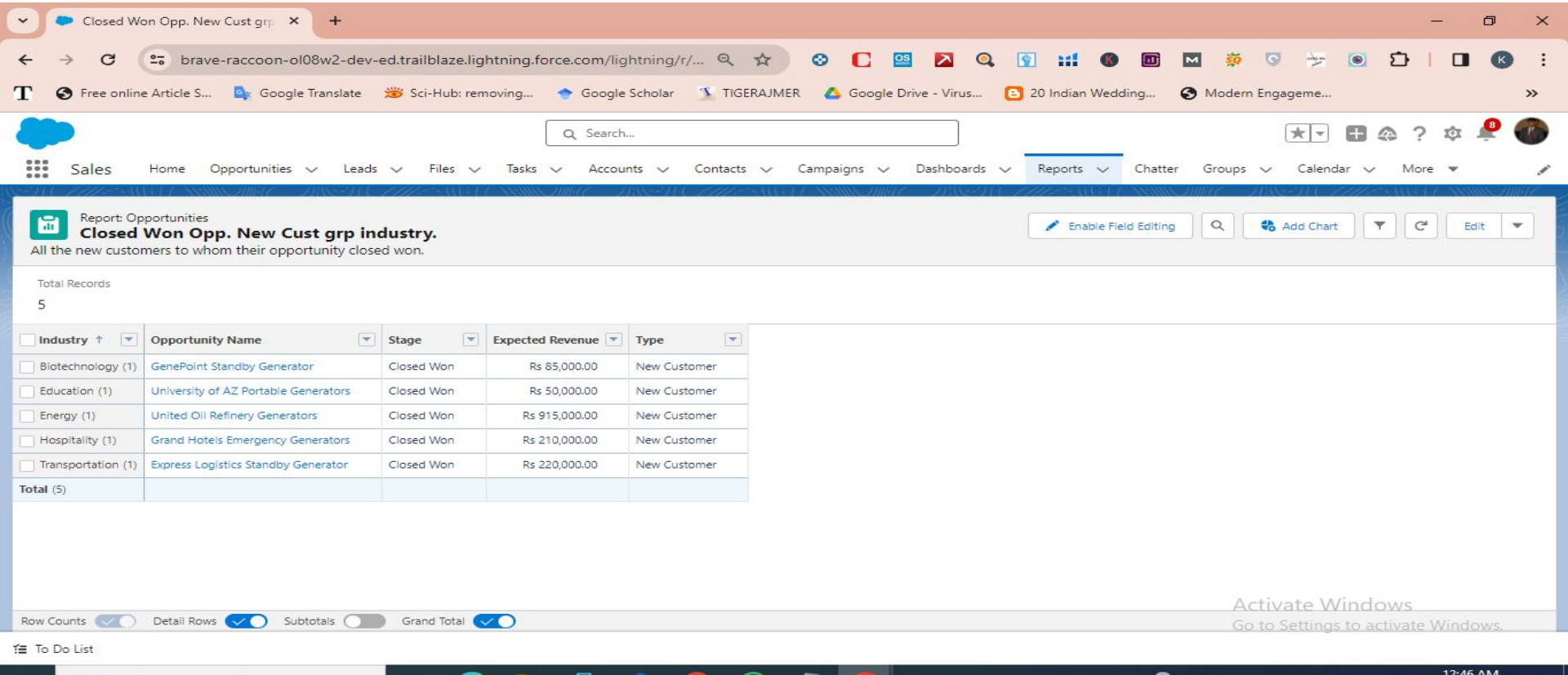

Task 6: Create Report Charts

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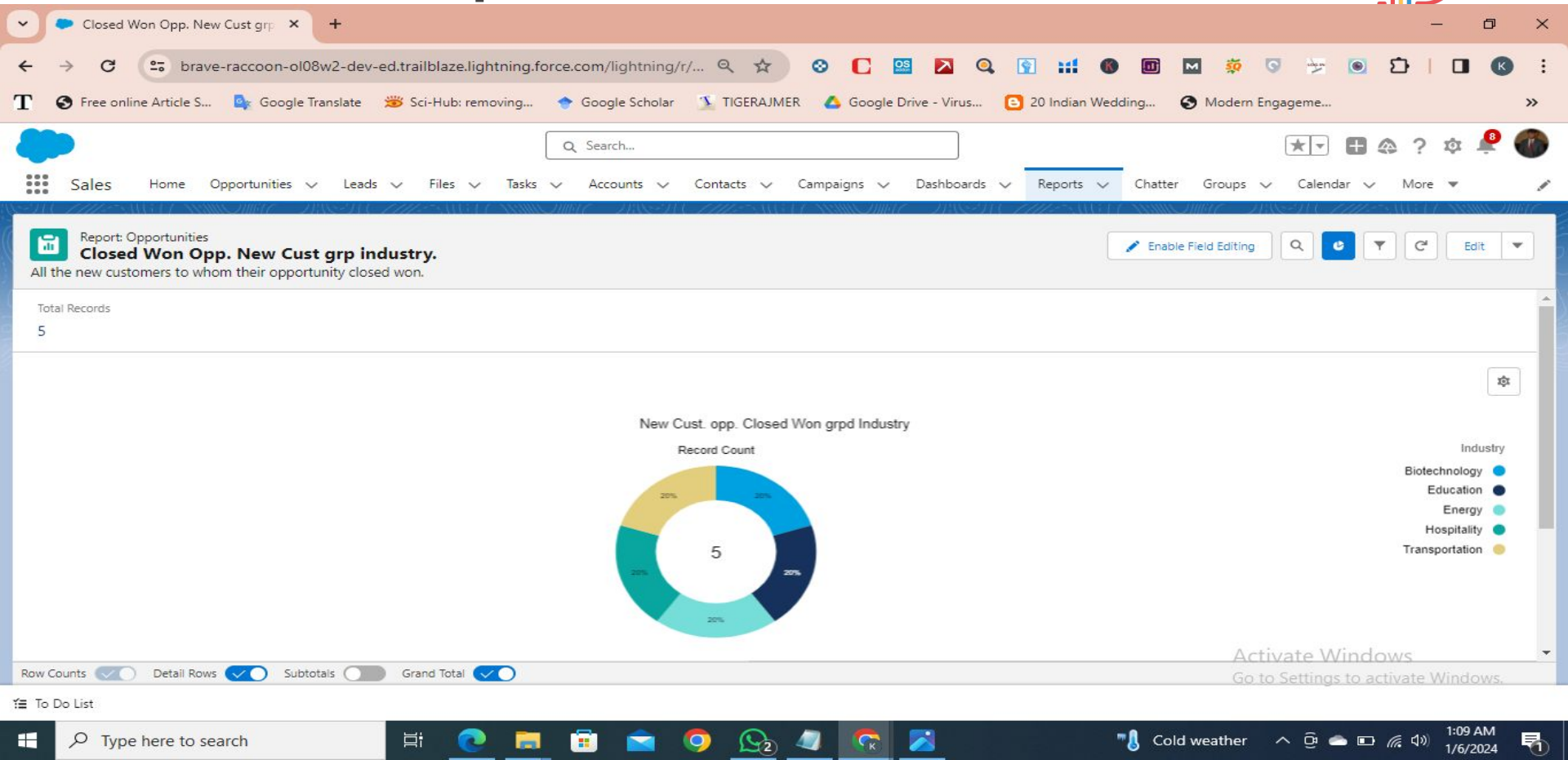
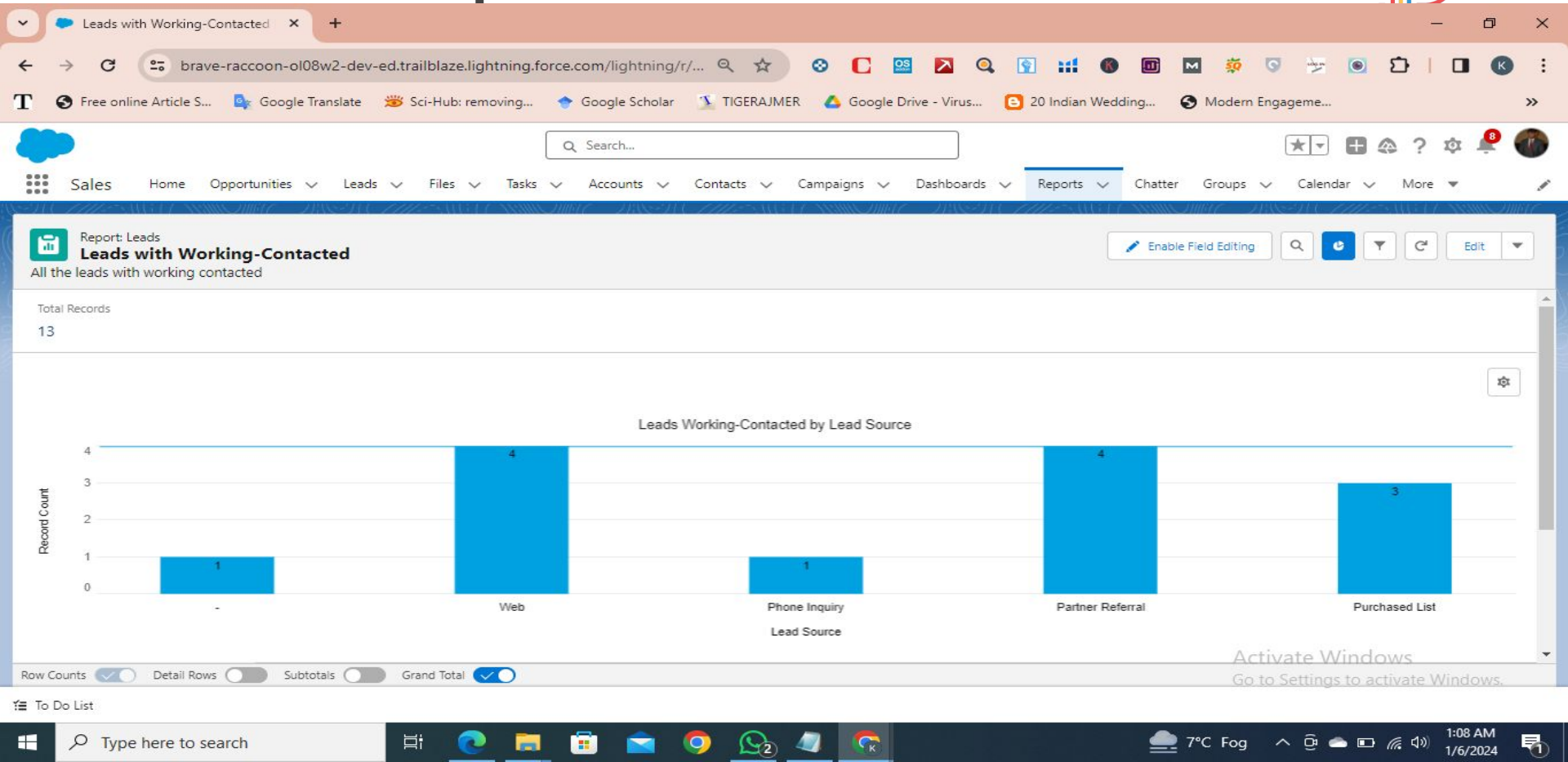
On the following slides, insert screenshots of the charts you just created:

- ***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%*

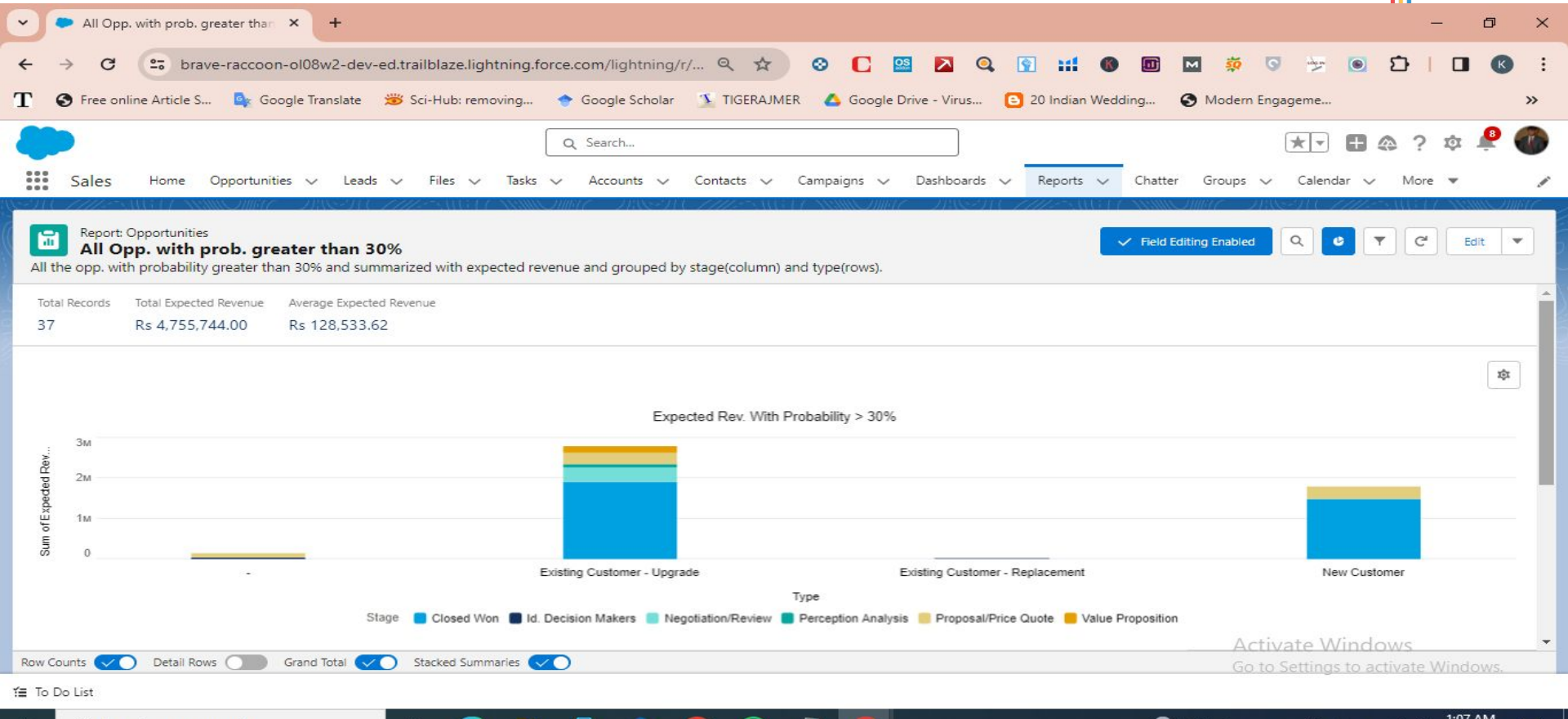
Task 6: Create Report Charts



Task 6: Create Report Charts



Task 6: Create Report Charts



Task 7: Create a Dashboard

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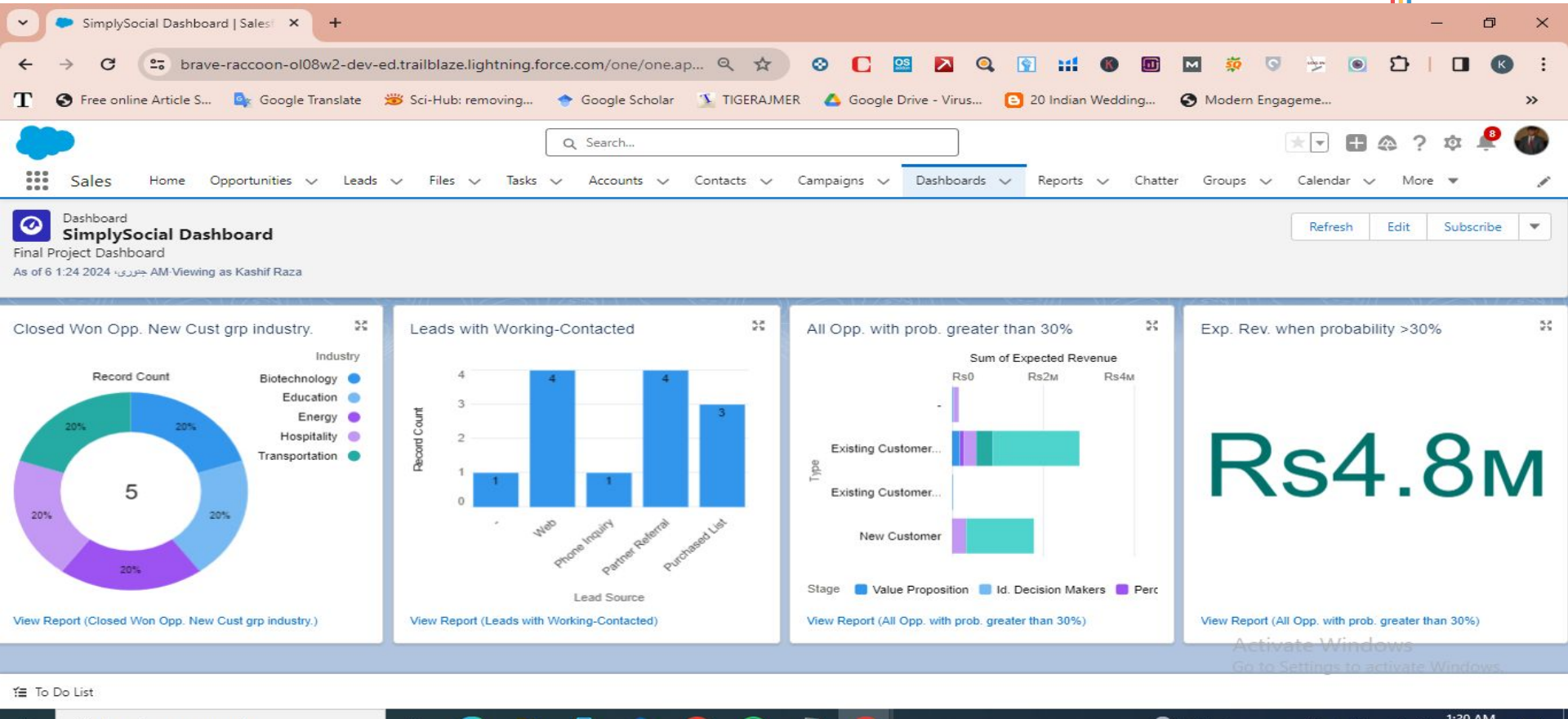
On the following slide, insert a screenshot of the dashboard you just created.

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.