

Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

Melanie Olisah



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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

REPORT ▼

New Customers Opportunities Report ✎

Opportunities



Add Chart

Outline

Filters 3

Groups

GROUP ROWS

Add group...



✓ Previewing a limited number of records. Run the report to see everything.

	Opportunity Name ▼	Stage ▼	Expected Revenue ▼	Type ▼
1	Edge Emergency Generator	Closed Won	\$75,000.00	New Customer
2	United Oil Refinery Generators	Closed Won	\$915,000.00	New Customer
3	Grand Hotels Emergency Generators	Closed Won	\$210,000.00	New Customer

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 ▼

Working - Contacted Leads Report ✎

Leads



Add Chart

Save & Run

Save ▼

Close

Run

>

Outline

Filters 2

✓ Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically



Groups

GROUP ROWS

Add group...



Lead Source



GROUP COLUMNS

Add group...



Columns



Add column...



First Name



Lead Source	First Name	Last Name	Title	Company / Account	Email	Street
Web (4)	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcof.net	321 Westco
	Brenda	Mcclure	CFO	Cadinal Inc.	brenda@cardinal.net	-
	Tom	James	SVP, Production	Delphi Chemicals	tom.james@delphi.chemicals.com	-
	Norm	May	VP, Facilities	Greenwich Media	norm_may@greenwich.net	-
Subtotal						
Phone Inquiry (1)	Violet	Maccleod	VP, Finance	Emerson Transport	violetm@emersontransport.com	-
Subtotal						
Partner Referral (3)	Patricia	Feager	CEO	International Shipping Co.	patricia_feager@is.com	-
	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	shellyb@westerntelecom.com	-
	Kelise	Alia	Director, Workplace Mgmt.	Arthur Home Products	kelise@arthurhome.com	-
Row Counts	Detail Rows	Subtotals	Grand Total			

Activate Windows
Go to Settings to activate Windows

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

Total and Average Expected Revenue

Enable Field Editing



Add Chart



Edit



Total Records 5 Total Expected Revenue 384,500.00 Average Expected Revenue 76,900.00

Type	Stage →	Value Proposition	Id. Decision Makers	Proposal/Price Quote	Total
<input type="checkbox"/> -	Total Expected Revenue	0.00	36,000.00	-	36,000.00
	Average Expected Revenue	0.00	36,000.00	-	18,000.00
	Record Count	1	1	0	2
<input type="checkbox"/> Existing Customer - Upgrade	Total Expected Revenue	125,000.00	-	202,500.00	327,500.00
	Average Expected Revenue	125,000.00	-	202,500.00	163,750.00
	Record Count	1	0	1	2
<input type="checkbox"/> Existing Customer - Replacement	Total Expected Revenue	-	21,000.00	-	21,000.00
	Average Expected Revenue	-	21,000.00	-	21,000.00
	Record Count	0	1	0	1
Total	Total Expected Revenue	125,000.00	57,000.00	202,500.00	384,500.00
	Average Expected Revenue	62,500.00	28,500.00	202,500.00	76,900.00
	Record Count	2	2	1	5

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 various reports in Salesforce helps SimplySocial make data-driven decisions by providing actionable insights tailored to specific business needs. Reports allow the team to analyze key metrics by leveraging report types (e.g., Opportunities or Accounts) and applying filters to focus on relevant data, such as high-probability deals or customer demographics. To create these reports, we selected the appropriate report type, added filters, grouped data, and visualized it using summaries and charts. By utilizing reports, SimplySocial can identify trends, monitor performance, and optimize strategies, ultimately improving efficiency and aligning efforts with company goals.

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

REPORT ▼

New Customers Opportunities by Industry ✎

Opportunities



Add Chart

Save & Run

Save ▼

Close

Run

>

Outline

Filters 3

✓ Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically ☐

Groups

GROUP ROWS

Add group...

Industry

GROUP COLUMNS

Add group...

Columns

Add column...

Opportunity Name

Industry ↑	Opportunity Name	Stage	Expected Revenue	Type
Electronics (1)	Edge Emergency Generator	Closed Won	\$75,000.00	New Customer
Subtotal				
Energy (1)	United Oil Refinery Generators	Closed Won	\$915,000.00	New Customer
Subtotal				
Hospitality (1)	Grand Hotels Emergency Generators	Closed Won	\$210,000.00	New Customer
Subtotal				
Total (3)				

Row Counts ☒

Detail Rows ☒

Subtotals ☒

Grand Total ☒

Activate Windows

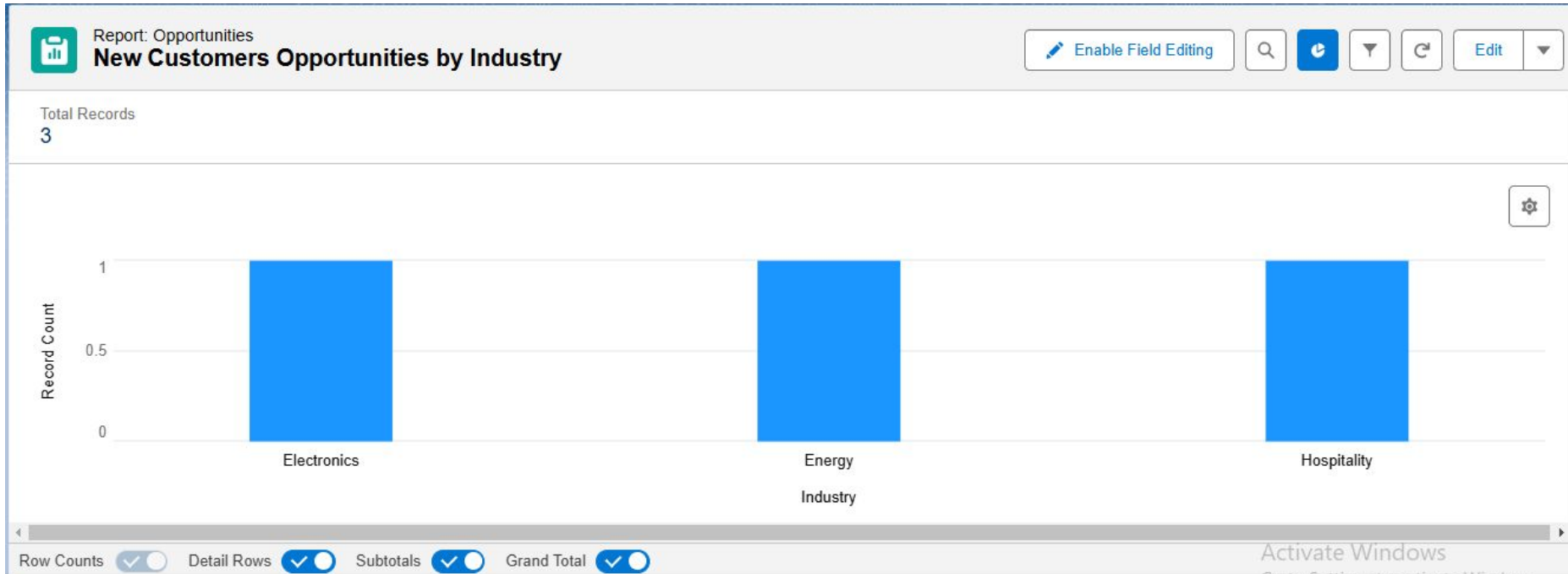
Go to Settings to activate Windows.

Task 6: Create Report Charts

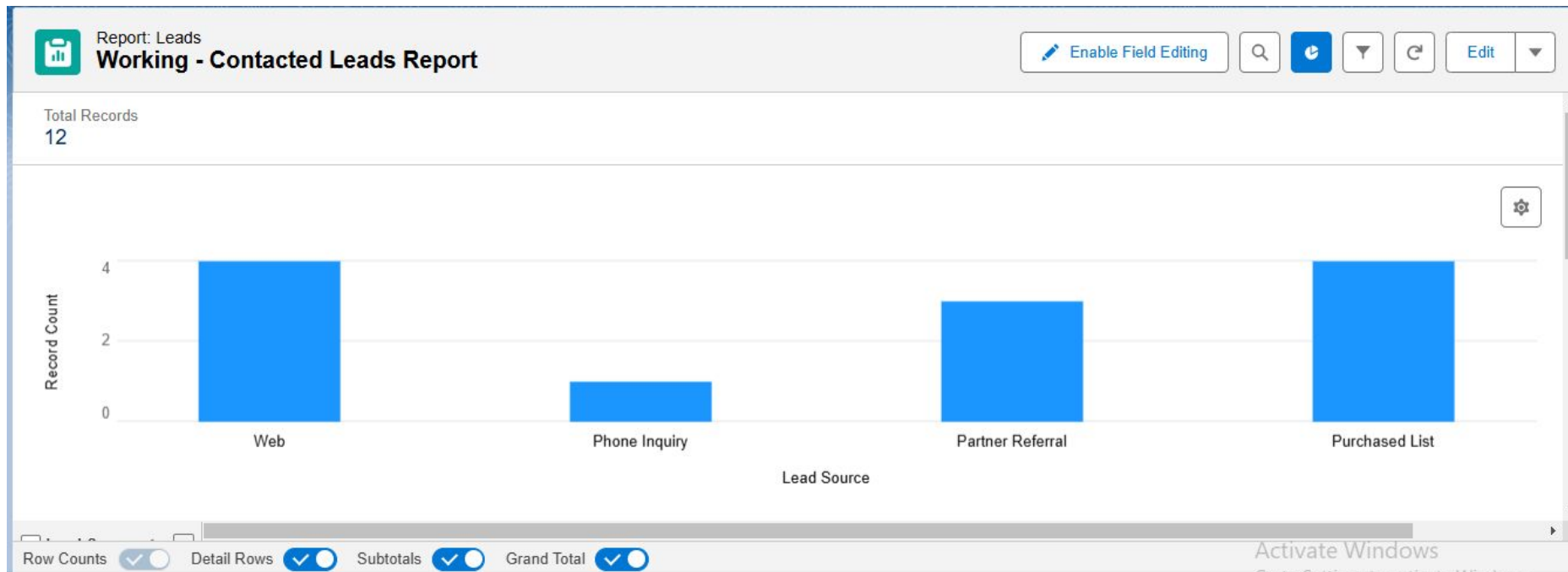
On the following slides, insert screenshots of the charts you just created:

- *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%*

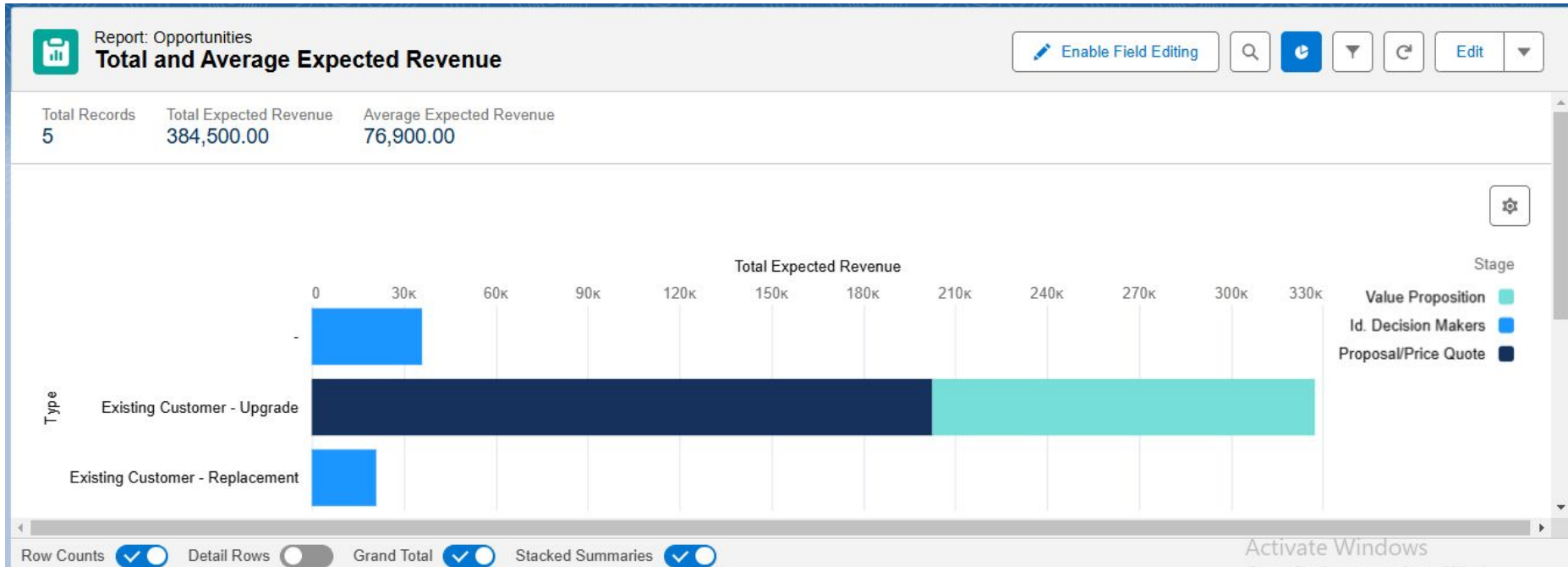
Task 6: Create Report Charts



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



Dashboard

Opportunities Dashboard

As of Dec 27, 2024, 2:29 AM - Viewing as Melanie Olisah

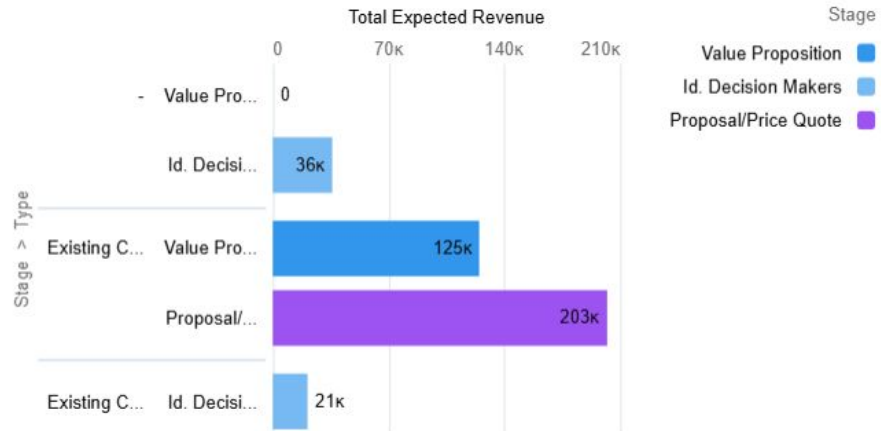
Refresh

Edit

Subscribe



Total and Average Expected Revenue



New Customers Opportunities b...

3

Working - Contacted Leads Report



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