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

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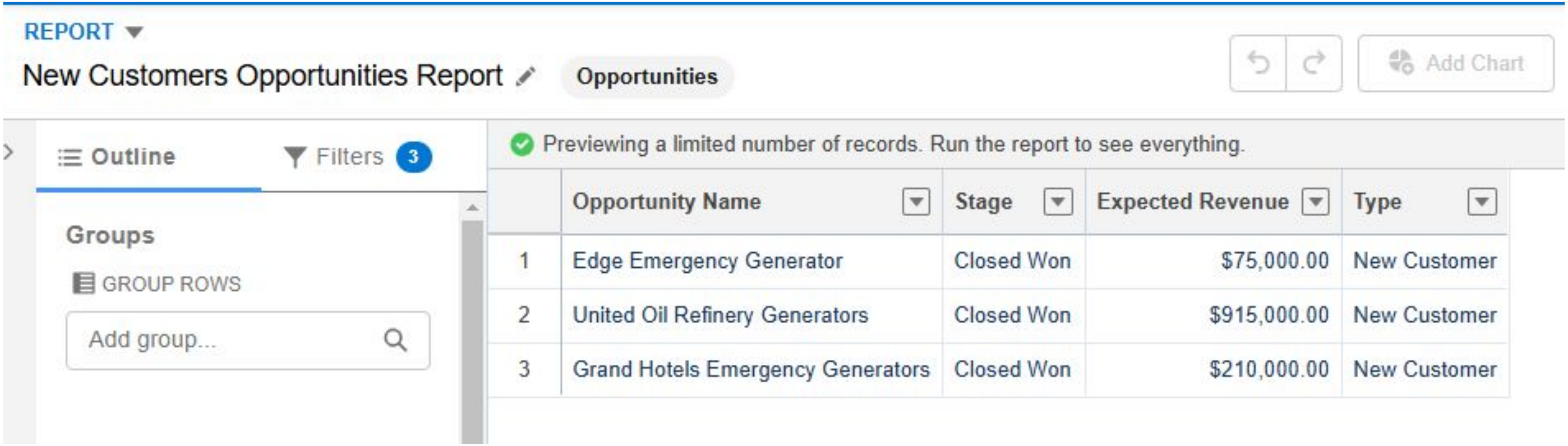

Task 2: Create a Summary Report

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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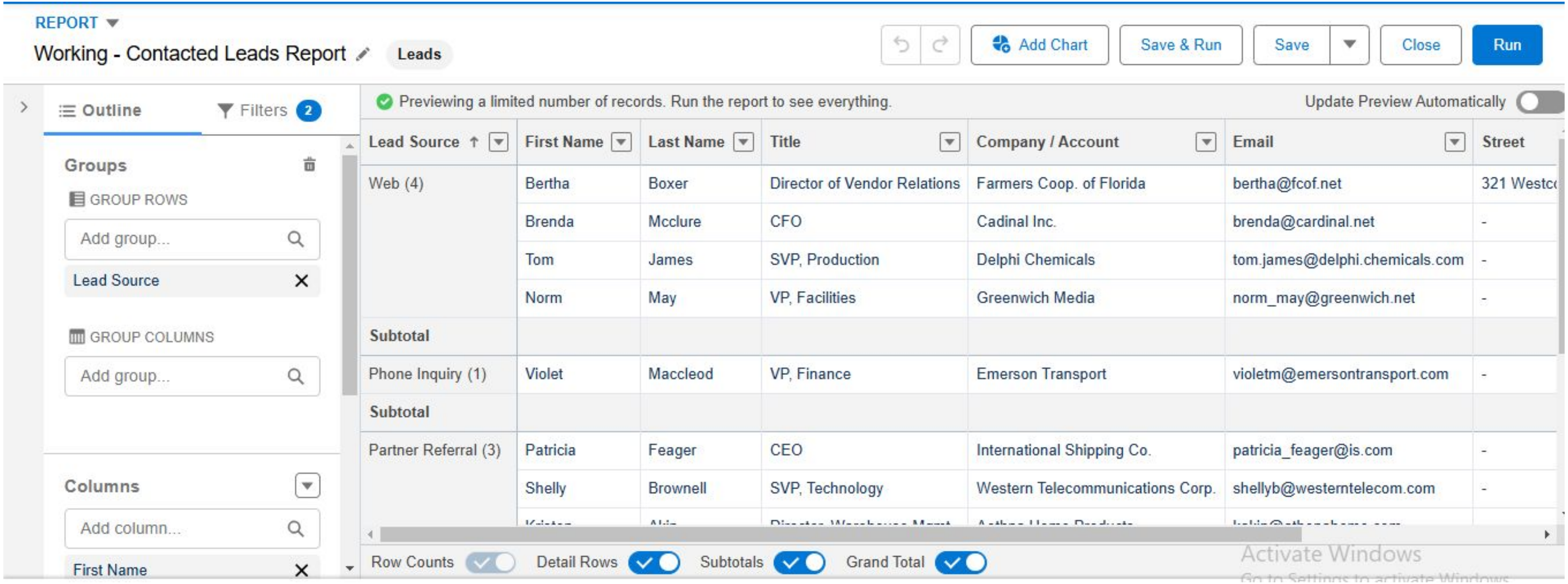

Task 3: Create a Matrix Report

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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

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Report: Opportunities

Total and Average Expected Revenue

Enable Field Editing | Add Chart | Edit

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

Type	Stage →	Value Proposition	Id. Decision Makers	Proposal/Price Quote	Total
-	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
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
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

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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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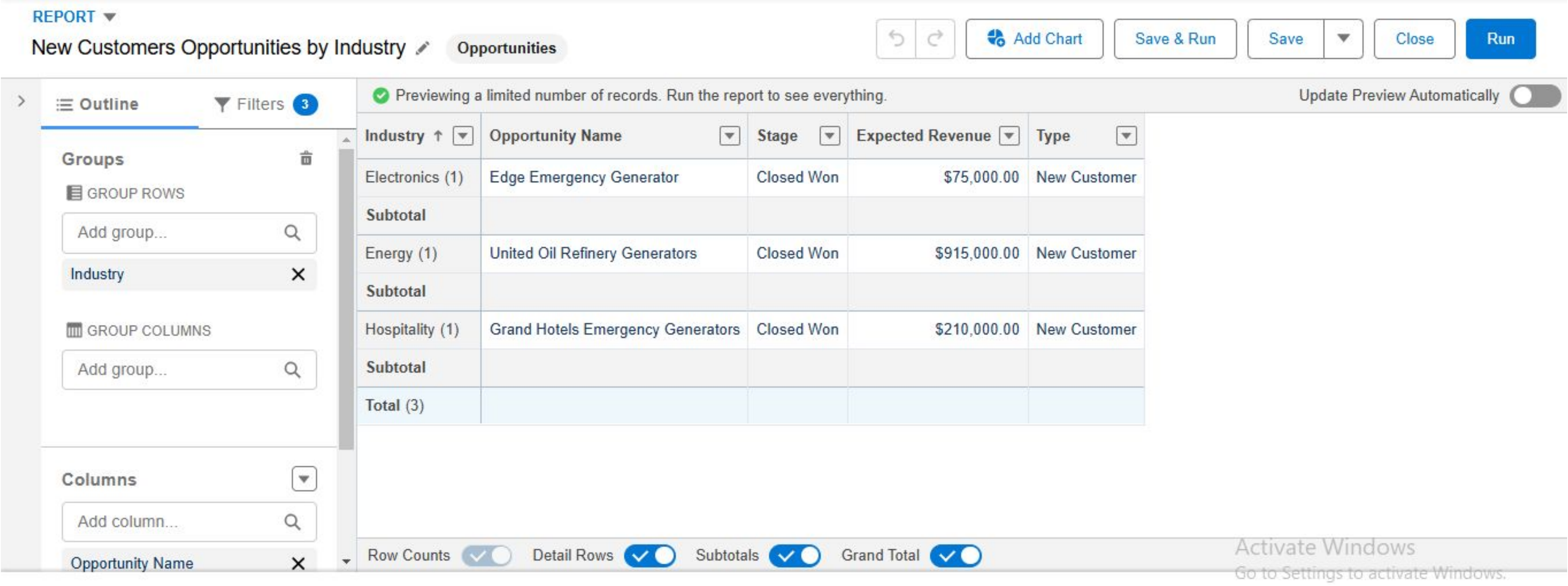
Using various reports in Salesforce helps SimplySocial make data-driven decisions by providing actionable insights tailored to specific business needs. Reports allow the team to analyze key metrics by leveraging report types (e.g., Opportunities or Accounts) and applying filters to focus on relevant 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



Task 6: Create Report Charts

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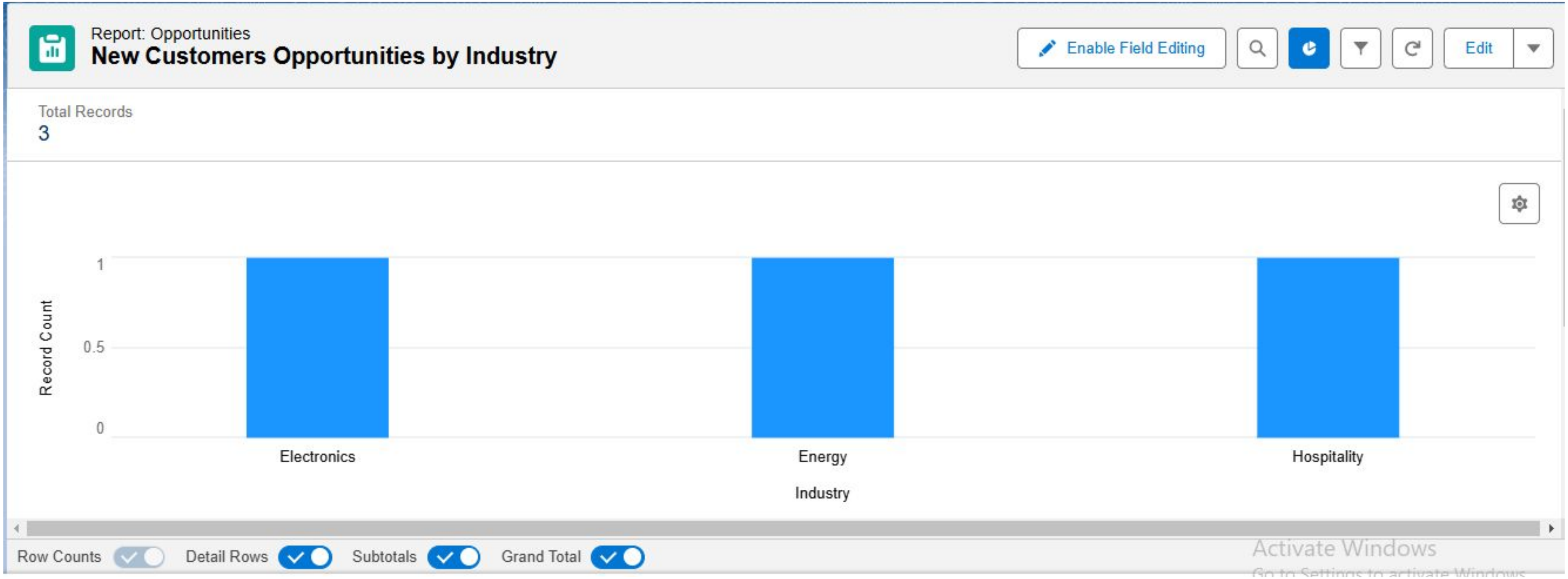
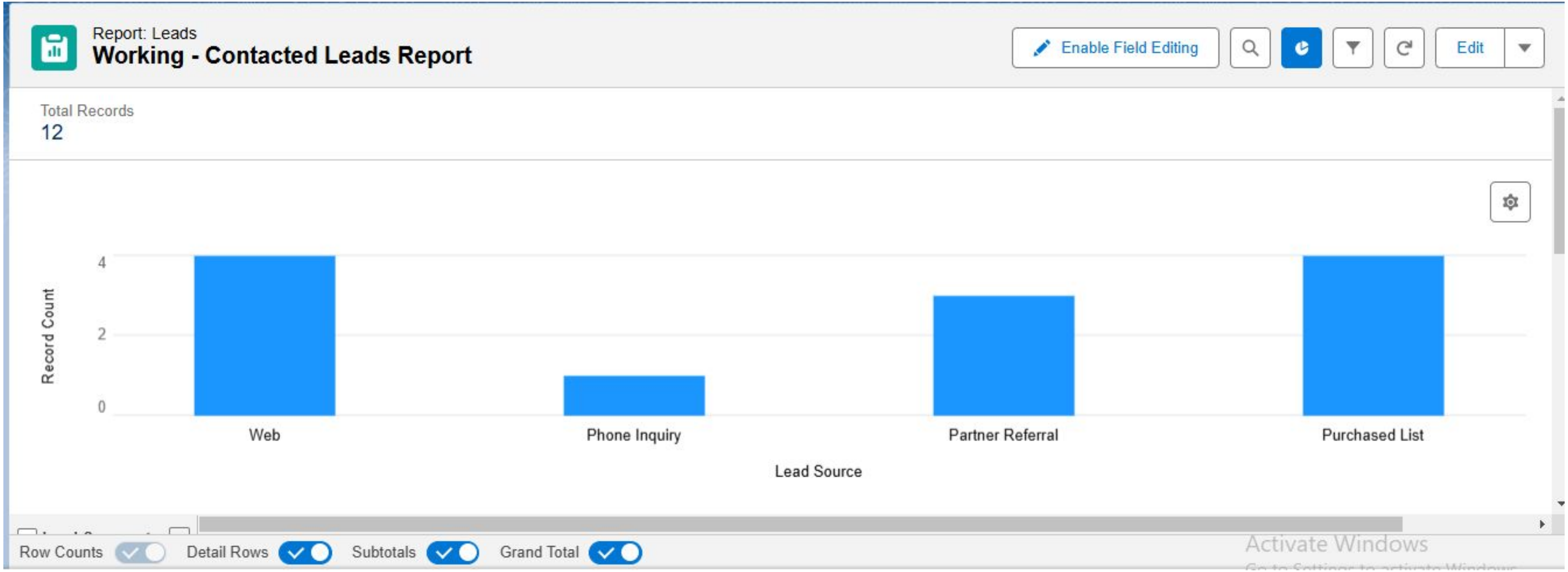
On the following slides, insert screenshots of the charts you just created:

- ***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%*

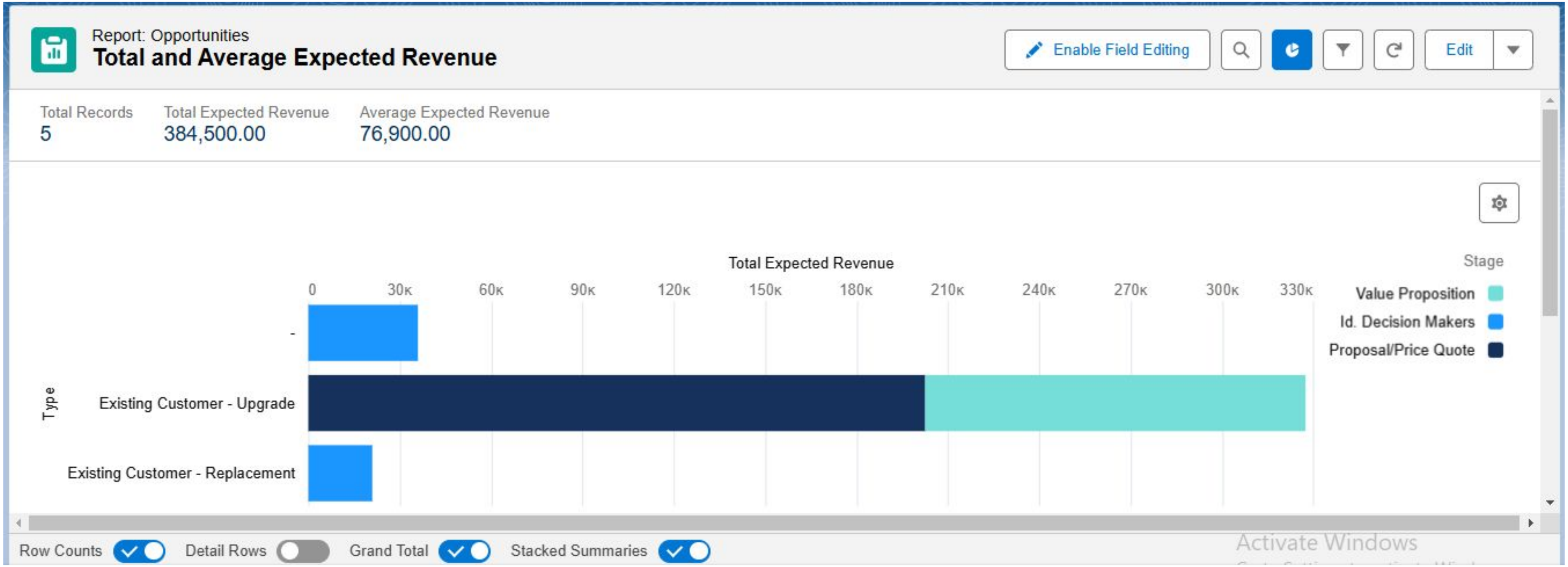
Task 6: Create Report Charts



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

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