TUTORIAL 1: GETTING STARTED WITH A SIMPLE DASHBOARD AND REPORT

Step 1: Create a New Dashboard

Let's start by creating a dashboard. It won't look like much without any components, but we'll fill it in as we go through these tutorials.

Each dashboard has a *running user*, whose security settings determine which data to display in a dashboard. For this dashboard, the default running user will be you, the creator.

1. Click the Dashboards tab. You'll see your most recently viewed dashboard.
2. Click **Go to Dashboard List**.
3. Click **New Dashboard**. This takes you to the dashboard builder, a drag-and-drop editor for creating a dashboard and its components.
   Since we haven't created our source reports, we can't add any dashboard components just yet.
4. Click **Dashboard Properties**.
5. Enter `Sales Manager Dashboard` for the title and accept the auto-generated unique name.
6. Choose the `My Personal Dashboards` folder for now. In a later tutorial, you'll create a shared folder.

7. Click **OK**.
8. Click **Save**, then close the dashboard.

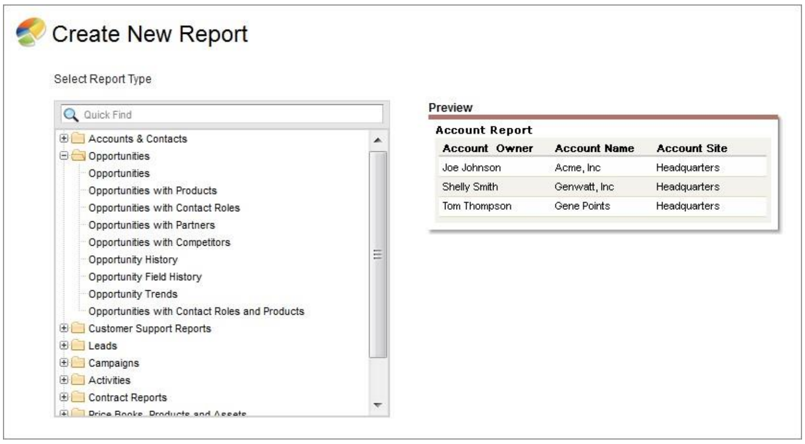
Step 2: Create the Closed Sales This Quarter Report

Before we can create dashboard components, we have to create the underlying source reports. In this step, we'll create a simple report showing closed sales for the current quarter. In the next step, we'll create a gauge on our Sales Manager Dashboard that shows these sales against quota.

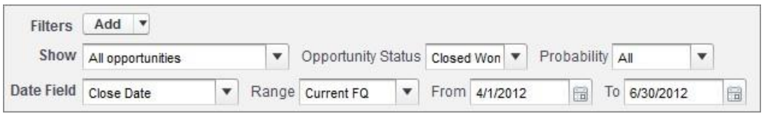
1. Click the Reports tab.

Step 2: Create the Closed Sales This Quarter Report

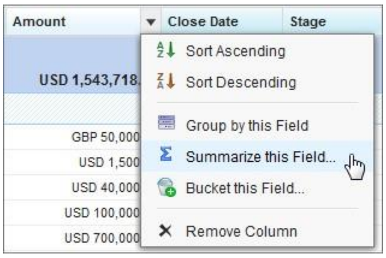
2. Click **New Report**.
3. Choose the `Opportunities` report type. This determines the data available to report on.



4. Click **Create**. This takes you to the report builder, a drag-and-drop visual editor for reports. Notice that a number of fields are already in the report by default.
5. Apply the following filters:
   - Select `All Opportunities` for `Show`.
   - Select `Closed Won` for `Opportunity Status`.
   - Select `Close Date` for `Date Field`.
   - Select `Current FQ` for `Range`.



6. Click **Tabular Format** and change the report format to **Summary**. This allows us to create groupings.
7. Group the report by `Close Month` by dragging that field into the grouping drop zone. You can create secondary groupings and add a chart, but let's keep it simple for now.
8. Click the menu for the `Amount` column and select **Summarize this Field**.



9. Select `Sum` and click **Apply**. This adds the amount for each grouping, as well as the grand total.
10. Click **Save**.
11. Name your report `Closed Sales This Quarter` and accept the auto-generated unique name.

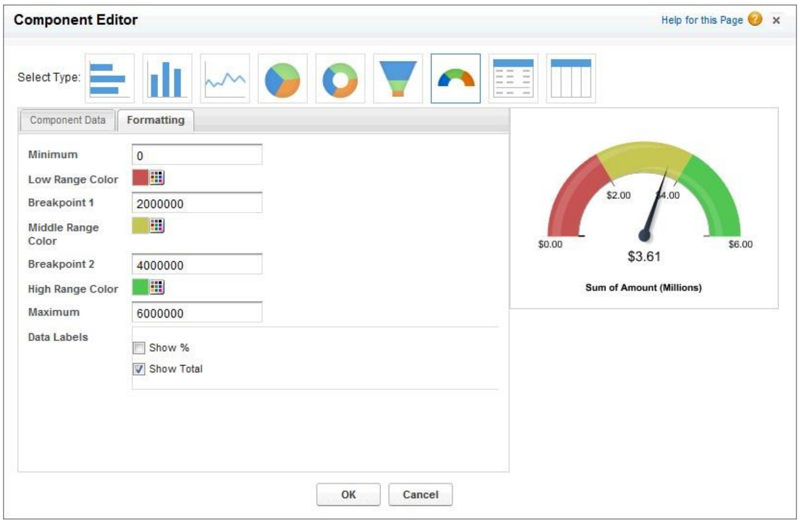
Step 3: Create the Gauge Dashboard Component

12. Enter a description and choose the `My Personal Custom Reports` folder for now. In a later tutorial, you'll create a shared folder.
13. Click **Save**, then close the report.

Step 3: Create the Gauge Dashboard Component

Let's create our first dashboard component, based on the report we just created. Gauge components distill complex information down to a single metric. Gauges are a great way to show how you're doing towards a goal.

1. Go back to the Sales Manager Dashboard we created earlier and click **Edit**.
2. Drag the gauge icon to the first column of the dashboard.
3. Click the Data Sources tab and start typing `Closed Sales This Quarter` into the search box.
4. When you find your report, drag it onto the gauge component. You've just created a dashboard component!
5. Click to edit the component. You may notice that the default breakpoints don't make good choices, so let's change them in the Formatting tab.
   - Enter breakpoint values that make sense for your data. `Breakpoint 2` should represent the goal for your quota. The
     `Maximum` value should be a stretch goal. Once you cross the second breakpoint, you're in the green. In this example, the conditional highlighting looks like this:



   - Click `Show Total` to display the sum of amount on the gauge.
   - Click **OK**.
6. Add a header, title, and footer by clicking those fields on the component:
   - Enter `Closed Sales` for the header. You can use headers to group components in each column.
   - Enter `Sales vs. Quota` for the title.
   - Enter `Sales for the Current Fiscal Quarter` for the footer.

Note: When you post a dashboard component snapshot to a Chatter feed, titles are shown, but headers and footers aren't.

We'll try this out in a later tutorial.

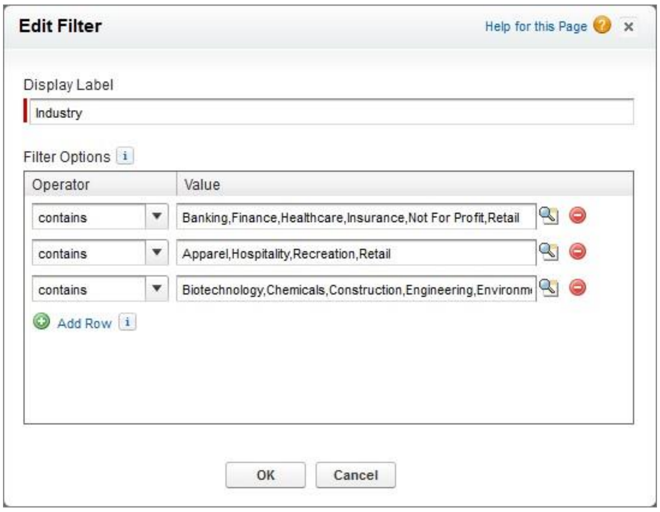
7. Click **Save**, then close the dashboard.

The end result should look something like this—a gauge of closed sales for the current quarter against projected quota:

Step 4: Filter the Dashboard

Not all your users are interested in the same data. For example, some sales reps may need to see data restricted to the industry sector they work in. You can meet that need with a dashboard filter.

1. Edit the dashboard you just created and click **Add Filter**.
2. For **Field**, type `Industry`.
3. Click the selector and choose the industry categories your users might be interested in.



4. Click **OK** and save your dashboard.

Notice that now you have a filter drop-down at the top of the screen. Sales reps working in different market segments can use that to narrow down their view to the opportunities that matter most to them.