

Phase 9: Reporting, Dashboards

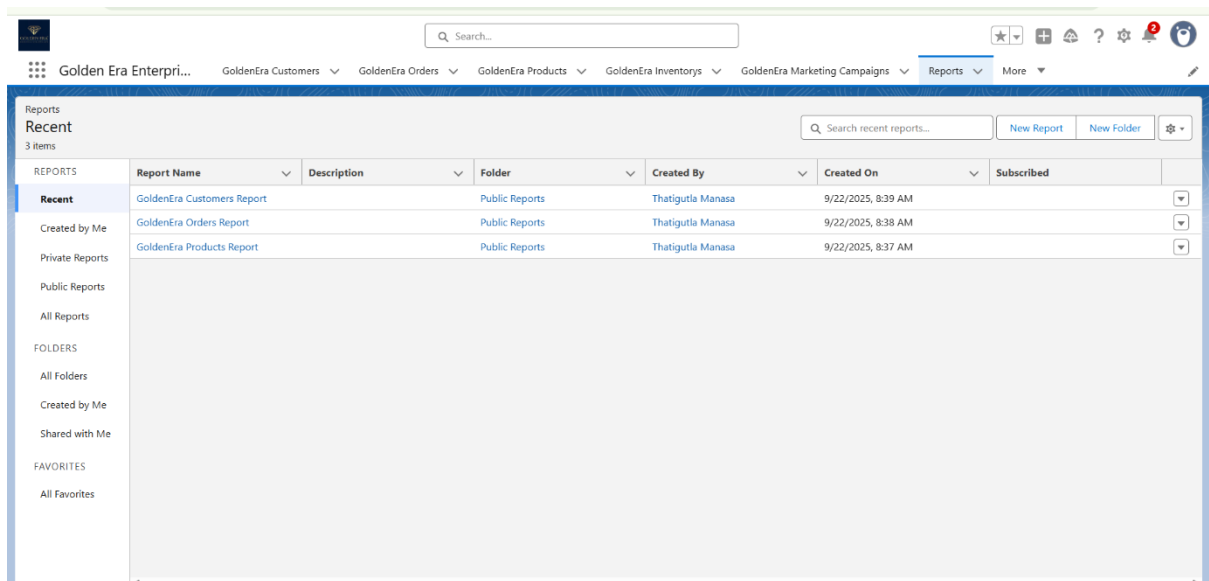
Step 1: Reporting

A **Report** is a **list or summary of records** in Salesforce that helps you analyze data.

- Reports allow you to **filter, sort, group, and summarize** your Salesforce data.
- Example: You can create a report to see **all orders placed this month** or **top-selling pro**

Steps:

- **Go to the App Launcher** → search **Reports** → click **Reports**.
- Click **New Report**.
- **Select the Report Type** (object to report on, e.g., GoldenEra Orders, GoldenEra Customer).
- Click **Continue**.
- **Add Filters**
 - Example: Show Orders where Status = Completed and Date = This Month.
- **Add Columns**
 - Choose which fields to display (like Customer Name, Order Date, Total Amount).
- **Group Data (optional)**
 - Example: Group orders by Product or by Customer.
- **Summarize (optional)**
 - Add totals, averages, or counts.
- Click **Save & Run** → Give report a name → Choose a folder to save.



Step 2: Dashboards

A Dashboard is a visual representation of your reports.

- Shows charts, graphs, metrics, or tables from one or multiple reports.
- Helps managers and teams quickly understand performance and trends.
- Example: A dashboard showing Top-Selling Products, Customer Engagement, and Inventory Levels.

Dashboard Components:

- Charts (Bar, Pie, Line)
- Gauges (show progress toward a target)
- Metrics (single numbers, e.g., total orders this month)
- Tables (report data in a grid)

Steps:

- Go to **App Launcher** → search **Dashboards** → click **Dashboards**.
- Click **New Dashboard**.
- Give it a **Name** and choose a **Folder** to save.
- Click **Create**.
- Click + **Component** to add a chart or metric.
- Select a **Report** you already created.
- Choose **Visualization Type**

- Bar Chart, Pie Chart, Gauge, Metric, Table.
- Configure **Data Display**
 - Select fields, groupings, and filters for the chart.
- Click **Add** → Repeat for other components.
- Click **Save** → **Done**.
- You can **refresh dashboard** to see updated data anytime.

