

Session 10

Introduction to Reports and Dashboards

Your business has questions. Your Salesforce data has the answers. When you get asked to build a report, the request typically comes in the form of a question. The question might be something like:

- Which products are my top sellers?
- Who are my highest value prospects?
- Which marketing campaigns have been the most successful?
- How satisfied are my customers?

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder.

Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Report is the standard object provided by the salesforce by which you can summarize data and you can do analysis based on it.

Salesforce Provides 2 Types of Reports

1. Standard Reports: Readymade Reports provided by Salesforce by default.
2. Custom Reports: The Developer / Administrator can configure the reports based on the application requirement.

Note:

Report Data will be always a RealTime Data. It will represent the records based on the currently logged in user's context

Use Report Format

There are four report formats available for your use: Tabular, Summary, Matrix, and Joined. Tabular is the default format.

Tabular Reports

Tabular reports are the simplest and fastest way to look at your data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. While easy to set up, they can't be used to create groups of data and there are limits to how you can use them in dashboards.

Consequently, they're often best used for tasks like generating a mailing list.

Summary Reports

Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. These will take you a bit more time to set up, but summary reports give us many more options for organizing the data, and are great for use in dashboards. Summary reports are the workhorses of reporting—you'll find that most of your reports tend to be of this format.

Matrix Reports:

Matrix reports allow you to group records both by row and by column. These reports are the most time-consuming to set up, but they also provide the most detailed view of our data. Like summary reports, matrix reports can have graphs and be used in dashboards.

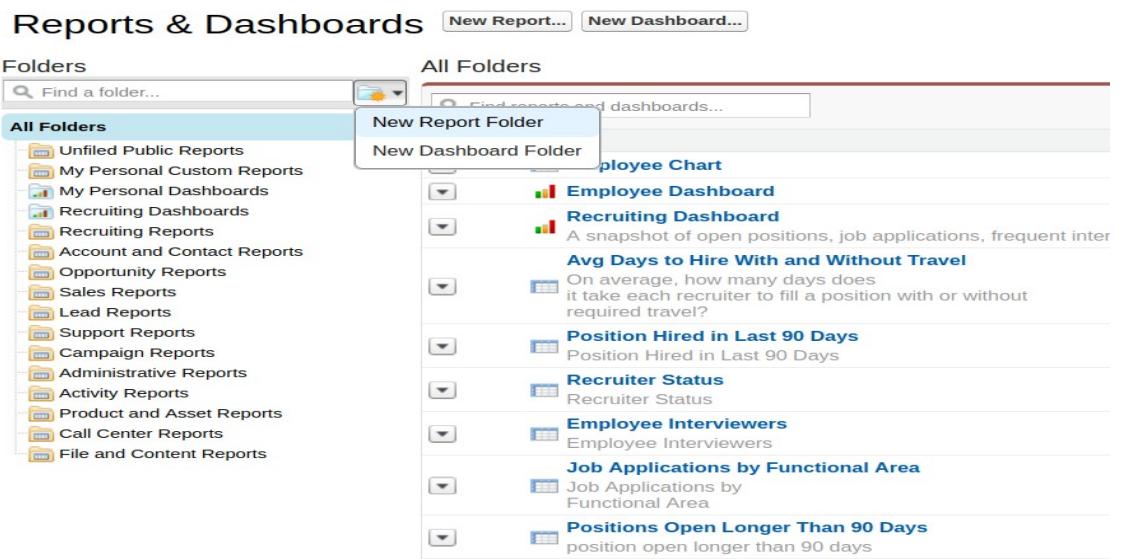
So why would you want to use a matrix report? If you're looking for an at-a-glance overview of data, especially for something like totals of revenue or quantity of products sold, then the matrix report format is for you.

Joined Reports:

Joined reports let you create different views of data from multiple report types. In a joined report, data is organized in blocks. Each block acts like a “sub-report,” with its own fields, columns, sorting, and filtering. You can add a chart to a joined report.

How to create Salesforce reports custom folder?

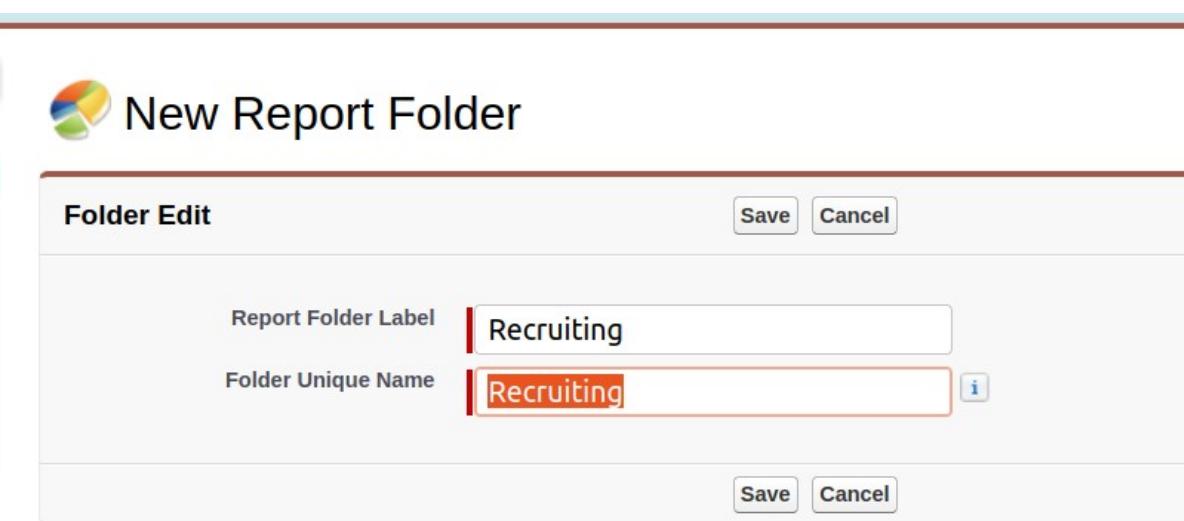
To create custom reports folder login Salesforce.com and navigate to Setup | Reports | New report folder.



The screenshot shows the 'Reports & Dashboards' section of the Salesforce interface. On the left, there's a sidebar with various report categories like 'Unfiled Public Reports' and 'Sales Reports'. The main area is titled 'All Folders' and contains a search bar and a list of existing report folders. A context menu is open over the list, with 'New Report Folder' highlighted. Other options in the menu include 'New Dashboard Folder' and 'Employee Chart'. Below the menu, several report items are listed with their names and brief descriptions.

Report Name	Description
Employee Dashboard	A dashboard showing employee performance metrics.
Recruiting Dashboard	A snapshot of open positions, job applications, frequent interact
Avg Days to Hire With and Without Travel	On average, how many days does it take each recruiter to fill a position with or without required travel?
Position Hired in Last 90 Days	Position Hired in Last 90 Days
Recruiter Status	Recruiter Status
Employee Interviewers	Employee Interviewers
Job Applications by Functional Area	Job Applications by Functional Area
Positions Open Longer Than 90 Days	position open longer than 90 days

Enter report folder name and unique name as desires.
Click on **Save button**.



The screenshot shows the 'New Report Folder' edit screen. At the top, there's a title 'New Report Folder' next to a pie chart icon. Below that is a 'Folder Edit' header with 'Save' and 'Cancel' buttons. The main form has two input fields: 'Report Folder Label' containing 'Recruiting' and 'Folder Unique Name' also containing 'Recruiting'. Both fields have a small info icon to the right. At the bottom of the form is another set of 'Save' and 'Cancel' buttons.

As shown above Recruiting report folder has been created successfully. we can move custom Salesforce reports from My Personal custom Reports to Recruiting report folder.

Salesforce reports and Dashboard can be deleted and can be retrieved from Recycle Bin.

The screenshot shows the Salesforce Recycle Bin interface. At the top, there is a navigation bar with tabs: Home (highlighted with a red circle), Pharma Products, Hospitals, Invoices, Reports, Dashboards, Sales Teams, and Samples. Below the navigation bar is a search bar with fields for 'Search All' and 'Go!', and a checkbox for 'Limit to items I own'. There is also a link for 'Advanced Search...'. To the right of the search bar is a large icon of a house labeled 'Recycle Bin'. Below the search bar is a green header bar with the text 'View: All recycle bin' and a 'Search' button. Underneath this is a table header with columns: Name, Type, Deleted By, and Deletion Date. A message 'No records to display.' is shown below the table. At the bottom of the page is a green footer bar with three buttons: 'Undelete', 'Empty your recycle bin', and 'Empty your organization's recycle bin'. On the left side of the page, there is a sidebar titled 'Recent Items' containing a list of deleted records with their names and icons: lead2, Lead Assignment to Country, INV-018, Tim Barr, Samp-004, Vitamin D, Samp-001, and Prasanth Kumar. At the bottom of the sidebar is a button labeled 'Recycle Bin' with a red circle around it.

Salesforce Report Area.

To create Salesforce reports, login to Salesforce.com and navigate to Setup | Reports | New Report | Select report type | Create.

When creating new Salesforce report we can find different Section in report area as shown below.

Control Area.

Quick find.

Data tab.

Standard Filter Area.

Report filter area.

Report data preview area.

Report Selection.

How to create Tabular report format in Salesforce.

The screenshot shows the Salesforce navigation bar with tabs for Home, Pharma Products, Hospitals, Invoices, Reports (which is highlighted with a red box), Dashboards, Sales Teams, Samples, and Visits. Below the navigation bar, there's a 'Reports & Dashboards' section. On the left, under 'Folders', there's a sidebar titled 'All Folders' containing a search bar and a list of report categories: Unfiled Public Reports, My Personal Custom Reports, My Personal Dashboards, SPHospital and SP Sales Team Reports, Opportunity Reports, Sales Reports, Lead Reports, Support Reports, Campaign Reports, Administrative Reports, Activity Reports, SP Product and Asset Reports, Call Center Reports, and File and Content Reports. On the right, under 'All Folders', there's another search bar, a 'Recently Viewed' dropdown, and a 'All Types' button. A table header with columns 'Action' and 'Name' is shown, followed by the message 'No records to display.'

To create Tabular Report in Salesforce, login salesforce with username and password. Now Navigate to Setup | Reports.

Now Click on New report as shown above.

The screenshot shows the 'Create New Report' interface in Salesforce. At the top, there's a navigation bar with tabs: Home, Pharma Products, Hospitals, Invoices, Reports (which is highlighted in red), and Dashboards. Below the navigation bar, the title 'Create New Report' is displayed next to a pie chart icon. There's a checkbox labeled 'Select Report Types to Hide' followed by an info icon. The main content area is titled 'Select Report Type' and contains a 'Quick Find' search bar. A tree view lists various report categories, with 'Opportunities' being the selected item, indicated by a red circle around its folder icon.

- SPHospitals & SP Sales Teams
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and SP Invoices
- Price Books, SP Products and Assets
- Administrative Reports
- File and Content Reports
- Other Reports

Select the report type that to be created. we creating Tabular report for Opportunities.

Click on Create button.

The screenshot shows the 'Report Properties' screen. At the top, there are buttons for 'Save', 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. Below these are sections for 'Fields' (with a 'Quick Find' search bar and a note to 'Drag and drop to add fields to the report.'), 'Filters' (with dropdowns for 'Show' set to 'All opportunities', 'Opportunity Status' set to 'Any', and 'Date Field' set to 'Close Date' with 'Range' 'All Time'), and a toolbar with 'Preview', 'Tabular Format', 'Show', and 'Remove All Columns' (the last one is highlighted with a red oval). On the left, there's a sidebar with sections for 'Bucket Fields' (containing 'Add Bucket Field') and 'Opportunity Information' (listing 'Created By', 'Created Alias', 'Last Modified By', and 'Last Modified Alias').

In Standard filter area, Select show all opportunities and opportunity status as Any, clear date ranges and select range as All time as shown above.

Click on Remove All columns to clear default columns.

Now select the fields from the data tab.

Drag and drop the fields to the columns.

Now add filter to add opportunities stage closed to own.

Select Stage equals to Closed own as shown below.

Select Closed Won and click on insert selected.



Lookup

Select the picklist values to add below.

Insert Selected

Deselect all

	Value
<input type="checkbox"/>	Prospecting
<input type="checkbox"/>	Qualification
<input type="checkbox"/>	Needs Analysis
<input type="checkbox"/>	Value Proposition
<input type="checkbox"/>	Id. Decision Makers
<input type="checkbox"/>	Perception Analysis
<input type="checkbox"/>	Proposal/Price Quote
<input type="checkbox"/>	Negotiation/Review
<input checked="" type="checkbox"/>	Closed Won
<input type="checkbox"/>	Closed Lost

Insert Selected

As shown below we have selected four field to the column area.

For Tabular report we have to define row limit. Click on Filter and add row limit. Enter maximum of 99 for limit and click on Ok button. When generating dashboards, Row limit are required for Tabular reports in Salesforce.com. Otherwise no Dashboard is generated with out row limit for tabular reports.

After adding row limit only a new tab called Dashboard Settings will appear as shown above. Click on Dashboard Settings to setup name and value which will be used in dashboards.

Number and currency fields are only available for Value.

Dashboard Settings

X

For tabular reports that have a limited row count, choose a Name and Value to use in dashboard tables and charts. Tables show both name and value. Charts are grouped by name.

Name	Opportunity Name	▼
Value	Amount	▼

OK

Cancel

Enter name as Opportunity Name and value as Amount.

Click on Ok button.

Now click on Run report.

Now all opportunities of type closed own will be displayed in tabular format as shown below.

 Opportunity Report[Help for this Page](#)

Report Generation Status: Complete

Prasanth Kumar
Report Options:

Summarize information by:

--None--

Time Frame

Date Field

Close Date

Range

Custom

From

To

Show

All opportunities

Opportunity Status

Any

Probability

All

Run Report

Hide Details

Customize

Save As

Printable View

Export Details

Filtered By: [Edit](#)Stage equals Closed Won [Clear](#)

Limited Display:

Limited to 99 rows, sorted Ascending by Opportunity Name [Clear](#)

Opportunity Name	Stage	Amount	Close Date
Burlington Textiles Weaving Plant Generator	Closed Won	\$235,000.00	11/4/2016
Edge Emergency Generator	Closed Won	\$75,000.00	12/29/2016
Edge Installation	Closed Won	\$50,000.00	10/20/2016
Edge SLA	Closed Won	\$60,000.00	9/15/2016
Express Logistics Standby Generator	Closed Won	\$220,000.00	9/25/2016
GenePoint SLA	Closed Won	\$30,000.00	12/26/2016
GenePoint Standby Generator	Closed Won	\$85,000.00	11/2/2016
Grand Hotels Emergency Generators	Closed Won	\$210,000.00	12/10/2016
Grand Hotels Generator Installations	Closed Won	\$350,000.00	12/12/2016
Grand Hotels SLA	Closed Won	\$90,000.00	9/22/2016
United Oil Emergency Generators	Closed Won	\$440,000.00	10/19/2016
United Oil Installations	Closed Won	\$270,000.00	10/25/2016
United Oil Installations	Closed Won	\$235,000.00	11/6/2016
United Oil Refinery Generators	Closed Won	\$915,000.00	12/7/2016
United Oil SLA	Closed Won	\$120,000.00	12/21/2016
United Oil Standby Generators	Closed Won	\$120,000.00	12/22/2016
University of AZ Portable Generators	Closed Won	\$50,000.00	9/29/2016
University of AZ SLA	Closed Won	\$90,000.00	10/3/2016

Grand Totals (18 records)

All opportunities are created and displayed in tabular format as per criteria.

Click on Save as button.

Enter report name.

Enter Salesforce Report Description.

Select Report folder and finally click on Save button.

Save Report

Report Name: Tabular Report in Salesforce

Report Unique Name: Tabular_Report_in_Salesforce

Report Description: Tabular report for opportunities

Report Folder: My Personal Custom Reports

Save Hierarchy Level: [i](#)

[Save](#) [Save and Run Report](#) [Cancel](#)

Reports & Dashboards [New Report...](#) [New Dashboard...](#) [Guided Tour](#) [Help for this Page](#)

Action	Name	Folder
View	Tabular Report in Salesforce Tabular report for opportunities	My Personal Custom Reports
View	Employee Chart	Unfiled Public Reports
View	Employee Dashboard	My Personal Dashboards
View	Recruiting Dashboard	Recruiting Dashboards

Whenever we access My personal custom report folder we can see our tabular report.

We have successfully created Tabular report. Like wise we can create other Salesforce Reports like Summary Reports, Matrix Reports and Joined Reports.

Salesforce Reports and Dashboards.

Salesforce reports and dashboards are the analytical side of the CRM They are used to convert business requirement

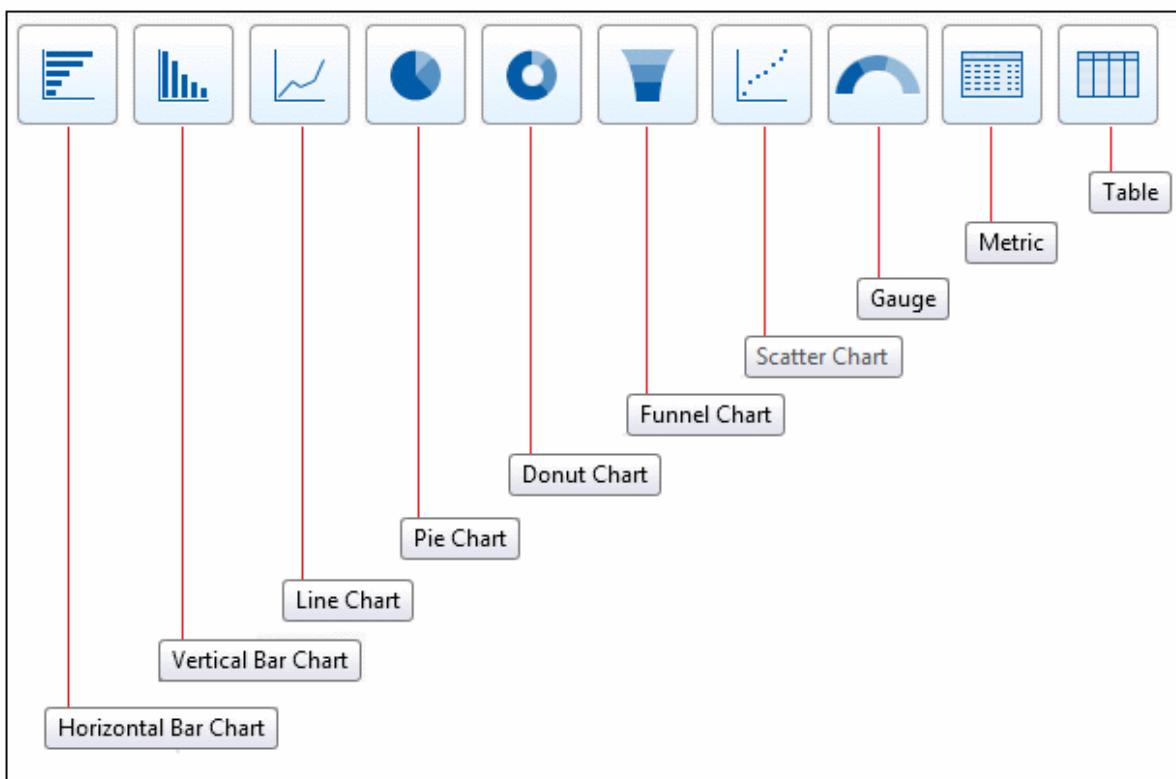
into Visual representations like Graphs, Pie Charts, Tables, Scatter Chart, Gauges, Metrics, Funnel chart and so on.

Salesforce Dashboards.

Salesforce dashboards are pictorial representation of reports data which can be displayed using Graphs, Bar charts, Pie Charts, Tables, Scatter Chart, Gauges, Metrics, Funnel chart and so on.

To represent Salesforce dashboards we have to use Dashboard components. Some of them are

Charts	Gauges	Tables	Metrics
Scatter Chart	Funnel Chart	Donut Chart	Pie Chart
Line Chart	Vertical bar chart	Horizontal Bar Chart	Visualforce pages



Salesforce Report Types.

Report types in Salesforce are like a template or framework used by Salesforce to get data from objects, relationships, and fields. There are two types of report types in Salesforce. They are

Standard Report types and

Custom Report Types.

Standard report types : Standard report types are the ones provided by salesforce.com by default and stored in Standard report folder. There are number of Standard report types some of them are

Accounts	Activities	Contacts
Call Center Reports	Campaign	Salesforce CRM Content
Leads	Opportunities	Pricebook

Products	Assets	Administrative Reports
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How to create Reports using Report Builder in Salesforce?

Salesforce reports and dashboards are stored in folders. We can also create new custom folder for reports and Dashboards.

Click on Reports as shown below.

Folders are used to group the reports. As shown above we have all folder sidebar, it has number of subfolder. Standard folder will have standard reports and Custom folders will have custom reports that we created.

Click on New report button as shown above.

The screenshot shows the Salesforce interface for creating a new report. At the top, there's a navigation bar with links like Home, Pharma Products, Hospitals, Invoices, Reports (which is highlighted in red), Dashboards, Sales Teams, Samples, Visits, FR, Leads, Cases, and a plus sign. Below the navigation is a title 'Create New Report' with a gear icon. A sidebar on the left is titled 'Select Report Types to Hide' and contains a 'Quick Find' search bar and a list of report types under 'SPHospitals & SP Sales Teams'. The 'Opportunities' item is circled in red. To the right, a 'Preview' section displays a table titled 'Opportunity (Pipeline) Report' with columns for Opportunity Name, Account, Stage, and Profitability. The table lists three opportunities: GenePoint, Genwatt, Inc., and Acme, along with their respective details and a grand total of \$705,000. At the bottom right of the preview area, there are 'Cancel' and 'Create' buttons, with the 'Create' button also circled in red.

Based on our criteria we can use standard reports and also we can create new reports. After selecting new report, in first steps we have to select report type.

So what is a report type? the report type defines the relationship between a primary object and its related object. Report types can be Standard report types and Custom report types.

The reports shown above are Standard report types.we are going to generate reports using Opportunities as shown below.

The screenshot shows the Salesforce Report builder interface. At the top, there are buttons for Save, Save As, Close, Report Properties, Add Report Type, and Run Report. Below these are sections for Fields (with an All button highlighted), Filters (with a Date Field dropdown set to Close Date and Range All Time), and a preview table.

Fields:

- Bucket Fields
- Opportunity Information
 - Created By
 - Created Alias
 - Last Modified By
 - Last Modified Alias
 - Opportunity Name
 - Type
 - Lead Source
 - Primary Partner
 - # Amount
 - # Opportunity Quantity
 - # Expected Revenue
 - # Closed
 - # Won
 - Close Date
 - Close Date (2)
 - Close Month
 - Last Stage Change Date
 - Next Step
 - Stage
 - # Probability (%)
 - Fiscal Period
 - # Fiscal Year
 - # Age
 - # Stage Duration
 - Forecast Category
 - Opportunity ID
 - Last Activity
 - Description
 - # Has SP Products
 - Created Date
 - Last Modified Date
 - # Private

Filters:

- Show: All opportunities
- Opportunity Status: Any
- Probability: > 90%
- Date Field: Close Date
- Range: All Time
- From: [empty]
- To: [empty]

Preview:

Opportunity Name	Amount	Lead Source	Created By	Type	Fiscal Year
Express Logistics Standby Generator	\$220,000.00	Trade Show	Prasanth Kumar	New Customer	2015
GenePoint Standby Generator	\$85,000.00	Partner	Prasanth Kumar	New Customer	2015
United Oil SLA	\$120,000.00	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
Edge Emergency Generator	\$75,000.00	Word of mouth	Prasanth Kumar	New Customer	2015
University of AZ Portable Generators	\$50,000.00	Public Relations	Prasanth Kumar	New Customer	2015
GenePoint SLA	\$30,000.00	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
Edge Installation	\$50,000.00	Word of mouth	Prasanth Kumar	Existing Customer - Upgrade	2015
Edge SLA	\$60,000.00	Word of mouth	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Installations	\$270,000.00	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
Grand Hotels Generator Installations	\$350,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Refinery Generators	\$915,000.00	Partner	Prasanth Kumar	New Customer	2015
University of AZ SLA	\$90,000.00	Public Relations	Prasanth Kumar	Existing Customer - Upgrade	2015
Burlington Textiles Weaving Plant Generator	\$235,000.00	Web	Prasanth Kumar	New Customer	2015
United Oil Installations	\$235,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Emergency Generators	\$440,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
Grand Hotels SLA	\$90,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Standby Generators	\$120,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
Grand Hotels Emergency Generators	\$210,000.00	External Referral	Prasanth Kumar	New Customer	2015
Grand Totals (18 records)					

This preview shows a limited number of records. Run the report to see all results.

We have multiple options available for creating Report using Salesforce Report builder. There is a left narrow section and right wide section available as shown above.

In left narrow section gives the information about all the fields and the fields displayed depends on the report type. Here the fields are related to opportunities and also we can use filters to select Only text fields, number fields and date fields. To list all fields click on All button.

In filter section we have four filter option they are field filter, filter logic, cross filter and row limit. Select the scenario to which you want to filter.

Add filter to the report and also select data field to which the reports are to be displayed.

Click on Ok button.

In Bottom section we can select the report format. Select any report format from the drop down menu.

Click on remove columns and add the fields from left side. Drag and drop from left side to preview tab.

Finally click on Run report button.

Opportunity Report

Report Generation Status: Complete

Prasanth Kumar

Report Options:

Summarize information by: --None--

Time Frame

Date Field Close Date Range Custom From To

Show All opportunities Opportunity Status Any Probability > 90%

Run Report Hide Details Customize Save As Printable View Export Details

Opportunity Name	Amount	Lead Source	Created By	Type	Fiscal Year
Express Logistics Standby Generator	\$220,000.00	Trade Show	Prasanth Kumar	New Customer	2015
GenePoint Standby Generator	\$85,000.00	Partner	Prasanth Kumar	New Customer	2015
United Oil SLA	\$120,000.00	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
Edge Emergency Generator	\$75,000.00	Word of mouth	Prasanth Kumar	New Customer	2015
University of AZ Portable Generators	\$50,000.00	Public Relations	Prasanth Kumar	New Customer	2015
GenePoint SLA	\$30,000.00	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
Edge Installation	\$50,000.00	Word of mouth	Prasanth Kumar	Existing Customer - Upgrade	2015
Edge SLA	\$60,000.00	Word of mouth	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Installations	\$270,000.00	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
Grand Hotels Generator Installations	\$350,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Refinery Generators	\$915,000.00	Partner	Prasanth Kumar	New Customer	2015
University of AZ SLA	\$90,000.00	Public Relations	Prasanth Kumar	Existing Customer - Upgrade	2015
Burlington Textiles Weaving Plant Generator	\$235,000.00	Web	Prasanth Kumar	New Customer	2015
United Oil Installations	\$235,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Emergency Generators	\$440,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
Grand Hotels SLA	\$90,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
United Oil Standby Generators	\$120,000.00	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
Grand Hotels Emergency Generators	\$210,000.00	External Referral	Prasanth Kumar	New Customer	2015

Grand Totals (18 records)

We have successfully generated report using Salesforce report builder. To summarize information by Amount as show below.

Report Generation Status: Complete

Prasanth Kumar
Report Options:

Summarize information by: **Amount**

Time Frame

Date Field: Close Date

Range: Custom

From: _____ To: _____

Show: All opportunities Opportunity Status: Any Probability: > 90%

Run Report Hide Details Customize Save As Printable View Export Details

Grouped By: Amount

Sorted By: Amount ↑ ↓

Opportunity Name	Lead Source	Created By	Type	Fiscal Year
<input type="checkbox"/> Amount: \$30,000.00 (1 record)				
<u>GenePoint SLA</u>	Partner	Prasanth Kumar	Existing Customer - Upgrade	2015
<input type="checkbox"/> Amount: \$50,000.00 (2 records)				
<u>University of AZ Portable Generators</u>	Public Relations	Prasanth Kumar	New Customer	2015
<u>Edge Installation</u>	Word of mouth	Prasanth Kumar	Existing Customer - Upgrade	2015
<input type="checkbox"/> Amount: \$60,000.00 (1 record)				
<u>Edge SLA</u>	Word of mouth	Prasanth Kumar	Existing Customer - Upgrade	2015
<input type="checkbox"/> Amount: \$75,000.00 (1 record)				
<u>Edge Emergency Generator</u>	Word of mouth	Prasanth Kumar	New Customer	2015
<input type="checkbox"/> Amount: \$85,000.00 (1 record)				
<u>GenePoint Standby Generator</u>	Partner	Prasanth Kumar	New Customer	2015
<input type="checkbox"/> Amount: \$90,000.00 (2 records)				
<u>University of AZ SLA</u>	Public Relations	Prasanth Kumar	Existing Customer - Upgrade	2015
<u>Grand Hotels SLA</u>	External Referral	Prasanth Kumar	Existing Customer - Upgrade	2015
<input type="checkbox"/> Amount: \$120,000.00 (2 records)				

We can also download the report file.

Summary Reports:

Summary reports are similar to Tabular Reports but these reports allows grouping of rows data. Rows data can be grouped up to four levels.

Summary Report is the second salesforce report format which allows users to group rows data which supports sorting and display subtotals.

Summary reports displays subtotals based on Value of a field.

Creating Summary reports in Salesforce.com.

navigate to Reports | Create new Report.

The screenshot shows the Salesforce 'Create New Report' interface for Opportunities. The top navigation bar includes 'Save', 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. The left sidebar lists fields: 'close' (highlighted), 'Formulas', 'Opportunity Information', '# Closed', 'Close Date', 'Close Date (2)', and 'Close Month'. The main area has a red box around the 'Filters' section, which contains 'Show' dropdowns for 'All opportunities' and 'Opportunity Status Any', and a 'Probability All' dropdown. Below it is a 'Date Field' section for 'Close Date' with a 'Range' dropdown set to 'All Time' and date pickers for 'From' and 'To'. A note says 'To add filters, click Add.' The preview section shows a summary table with columns: Opportunity Name, Type, Lead Source, Amount (sorted), and Close Date. The table is grouped by Stage: Prospecting (1 Record), Qualification (1 Record), Value Proposition (2 Records), Decision Makers (2 Records), Proposal/Price Quote (1 Record), Negotiation/Review (2 Records), and Closed Won (11 Records). The total amount is \$3,410,000.00. A note at the bottom says 'This preview shows a limited number of records. Run the report to see all results.'

Opportunity Name	Type	Lead Source	Amount	Close Date
Stage: Prospecting (1 Record)				
Pyramid Emergency Generators	-	Phone Inquiry	\$100,000.00	11/7/2016
Stage: Qualification (1 Record)				
Dickenson Mobile Generators	New Customer	Purchased List	\$15,000.00	11/11/2016
Stage: Value Proposition (2 Records)				
Express Logistics Portable Truck Generators	Existing Customer - Upgrade	External Referral	\$330,000.00	9/23/2016
Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	Employee Referral	\$250,000.00	12/29/2016
Stage: Id. Decision Makers (2 Records)				
Grand Hotels Kitchen Generator	Existing Customer - Upgrade	-	\$75,000.00	9/20/2016
GenePoint Lab Generators	-	-	\$60,000.00	12/23/2016
Stage: Proposal/Price Quote (1 Record)				
United Oil Refinery Generators	Existing Customer - Upgrade	-	\$270,000.00	12/14/2016
Stage: Negotiation/Review (2 Records)				
United Oil Office Portable Generators	Existing Customer - Upgrade	-	\$395,000.00	10/30/2016
United Oil Installations	Existing Customer - Upgrade	-	\$270,000.00	10/26/2016
Stage: Closed Won (11 Records)				
GenePoint SLA	Existing Customer - Upgrade	Partner	\$2,225,000.00	12/26/2016
University of AZ Portable Generators	New Customer	Public Relations	\$30,000.00	9/29/2016
Edge Installation	Existing Customer - Upgrade	Word of mouth	\$50,000.00	10/20/2016
Edge SLA	Existing Customer - Upgrade	Word of mouth	\$60,000.00	9/15/2016
Edge Emergency Generator	New Customer	Word of mouth	\$75,000.00	12/29/2016
GenePoint Standby Generator	New Customer	Partner	\$85,000.00	11/2/2016
United Oil SLA	Existing Customer - Upgrade	Partner	\$120,000.00	12/21/2016
Express Logistics Standby Generator	New Customer	Trade Show	\$220,000.00	9/26/2016
United Oil Installations	Existing Customer - Upgrade	Partner	\$270,000.00	10/25/2016
Grand Hotels Generator Installations	Existing Customer - Upgrade	External Referral	\$350,000.00	12/12/2016
United Oil Refinery Generators	New Customer	Partner	\$915,000.00	12/7/2016
Grand Totals (20 records)				\$3,410,000.00

How to add Summary fields to preview pane ?

As shown above we have to add Summary fields to the fields pane follow the steps given below.

Drag OpportunityName, Type, Lead Source, Amount, Probability, closed data from field pane to grouping section of the preview pane.

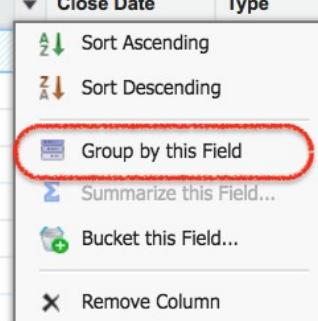
Wait for the loading dialog to complete.

Select Summary format.

In filter section area, select show all opportunities and select range as all time.

Now go to Stage field on the column and selectGroup by this field.

Opportunity Name	Stage	Close Date	Type
Drop a field here to create a grouping. Hide			
Dickenson Mobile Generators	Qualification		
Grand Hotels Kitchen Generator	Id. Decision Makers		
GenePoint SLA	Closed Won		
University of AZ Portable Generators	Closed Won		
Edge Installation	Closed Won		
GenePoint Lab Generators	Id. Decision Makers		
Edge SLA	Closed Won		
Edge Emergency Generator	Closed Won	12/29/2016	New Customer
Express Logistics Portable Truck Generators	Value Proposition	9/23/2016	Existing Customer - Upgrade
GenePoint Standby Generator	Closed Won	11/2/2016	New Customer
Pyramid Emergency Generators	Prospecting	11/7/2016	-
United Oil SLA	Closed Won	12/21/2016	Existing Customer - Upgrade
United Oil Office Portable Generators	Negotiation/Review	10/30/2016	Existing Customer - Upgrade
Express Logistics Standby Generator	Closed Won	9/25/2016	New Customer
Grand Hotels Guest Portable Generators	Value Proposition	12/29/2016	Existing Customer - Upgrade
United Oil Refinery Generators	Proposal/Price Quote	12/14/2016	Existing Customer - Upgrade
United Oil Installations	Negotiation/Review	10/26/2016	Existing Customer - Upgrade
United Oil Installations	Closed Won	10/25/2016	Existing Customer - Upgrade
Grand Hotels Generator Installations	Closed Won	12/12/2016	Existing Customer - Upgrade
United Oil Refinery Generators	Closed Won	12/7/2016	New Customer
Grand Totals (20 records)			



Now the report will appear as shown below.

Opportunity Name			Close Date	Type
Stage: Prospecting (1 Record)				
Drop a field here to create a grouping. Hide				
Pyramid Emergency Generators			11/7/2016 -	
Stage: Qualification (1 Record)				
Dickenson Mobile Generators			11/11/2016	New Customer
Stage: Value Proposition (2 Records)				
Express Logistics Portable Truck Generators			9/23/2016	Existing Customer - Upgrade
Grand Hotels Guest Portable Generators			12/29/2016	Existing Customer - Upgrade
Stage: Id. Decision Makers (2 Records)				
Grand Hotels Kitchen Generator			9/20/2016	Existing Customer - Upgrade
GenePoint Lab Generators			12/23/2016 -	
Stage: Proposal/Price Quote (1 Record)				
United Oil Refinery Generators			12/14/2016	Existing Customer - Upgrade
Stage: Negotiation/Review (2 Records)				
United Oil Office Portable Generators			10/30/2016	Existing Customer - Upgrade
United Oil Installations			10/26/2016	Existing Customer - Upgrade
Stage: Closed Won (11 Records)				

We have grouped rows data based on opportunity Stage. Drag and drop Stage field to group rows data. Salesforce Summary reports can have up to four grouping levels. Summary field is the currency field used to SUM, AVERAGE, MIN or Max for a number and to group levels including grand total levels for reports.

We have grouped data by another field byClosed data.

Preview Summary Format ▾ Show ▾ [Add Chart](#) Remove All Columns

Opportunity Name	Type
Stage: Prospecting (1 Record)	
Close Date: Q4 FY2016 (1 Record)	<ul style="list-style-type: none">Sort Group By ▾Group Dates By ▾ Create a grouping... HideMove Group UpMove Group DownRemove Group
DICKENSON MOBILE GENERATORS	
Stage: Value Proposition	
Close Date: Q3 FY2016 (1 Record)	
Express Logistics Portable Truck	
Close Date: Q4 FY2016 (1 Record)	

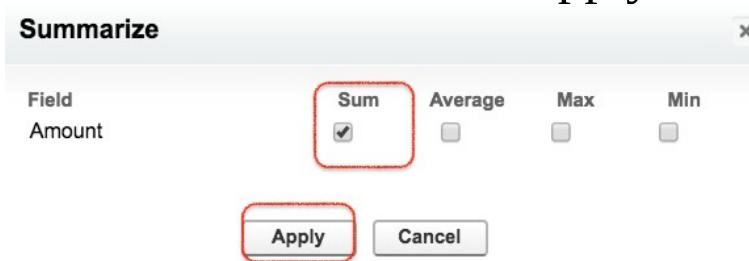
How to add summary field to a report?

To add Summary field in Summary report format, click on column drop down section and chooseSummarize this field.

The screenshot shows a Salesforce report interface. At the top, there are buttons for 'Preview', 'Summary Format', 'Show', 'Add Chart', and 'Remove All Columns'. Below this is a table with columns: 'Opportunity Name', 'Type', 'Lead Source', 'Amount', and 'Expected'. A context menu is open over the 'Amount' column, listing options: 'Sort Ascending', 'Sort Descending', 'Group by this Field', 'Summarize this Field...', 'Bucket this Field...', and 'Remove Column'. The 'Summarize this Field...' option is circled in red. The report data includes sections like 'Stage: Prospecting (1 Record)', 'Close Date: Q4 FY2016 (1 Record)', and various opportunity entries with their respective details and amounts.

Now pop up menu will be displayed.

Select Sum and click on apply button.



What is Conditional Highlighting in Salesforce reports?

Conditional Highlighting is a powerful way to show values in report within given limits. We can specify colours for

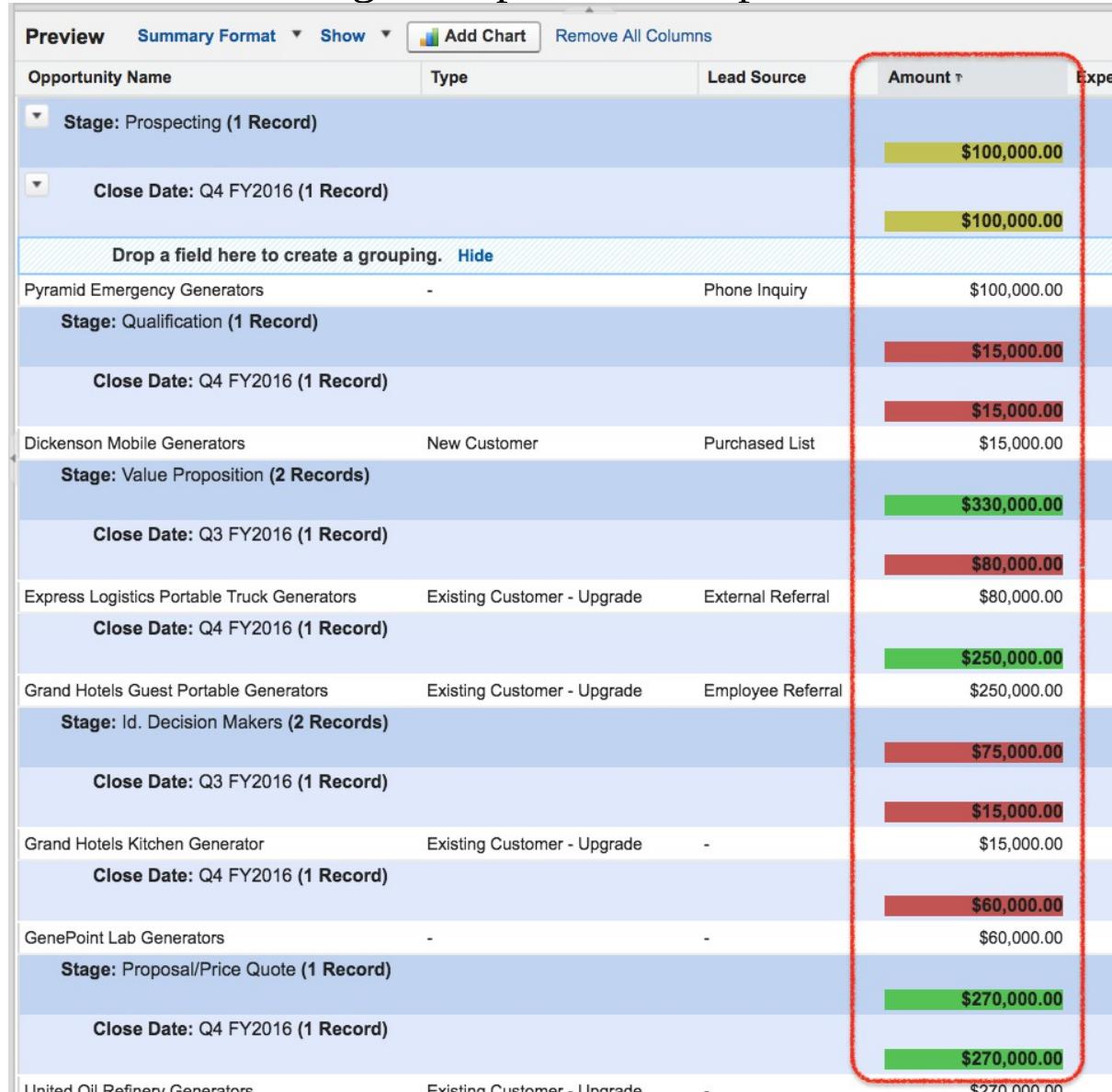
different ranges of values in reports using conditional highlighting.

Click on show drop down and select Conditional Highlighting.

The color to show data for low breakpoint and high break point must be defined as shown below.

Now click onRun report.

Now above settings will produce a report result as shown.



To click on Run Report and Summary report will be displayed as given below.

Report Generation Status: Complete

Prasanth Kumar

Report Options:

Summarize information by: Stage

Date Field: Close Date Range: Custom
From: _____ To: _____

Show: All opportunities Opportunity Status: Any Probability: All

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Grouped By: Stage
Sorted By: Stage ↑

Opportunity Name	Close Date	Type	Lead Source	Amount	Expected Revenue
<input type="checkbox"/> Stage: Prospecting (1 record)				\$100,000.00	
Pyramid Emergency Generators	11/7/2016	-	Phone Inquiry	\$100,000.00	\$10,000.00
<input type="checkbox"/> Stage: Qualification (1 record)				\$15,000.00	
Dickenson Mobile Generators	11/11/2016	New Customer	Purchased List	\$15,000.00	\$1,500.00
<input type="checkbox"/> Stage: Needs Analysis (1 record)				\$675,000.00	
United Oil Plant Standby Generators	11/23/2016	Existing Customer - Upgrade	-	\$675,000.00	\$135,000.00
<input type="checkbox"/> Stage: Value Proposition (2 records)				\$330,000.00	
Express Logistics Portable Truck Generators	9/23/2016	Existing Customer - Upgrade	External Referral	\$80,000.00	\$40,000.00
Grand Hotels Guest Portable Generators	12/29/2016	Existing Customer - Upgrade	Employee Referral	\$250,000.00	\$125,000.00
<input type="checkbox"/> Stage: Id. Decision Makers (3 records)				\$110,000.00	
Grand Hotels Kitchen Generator	9/20/2016	Existing Customer - Upgrade	-	\$15,000.00	\$9,000.00
Edge Emergency Generator	1/4/2017	Existing Customer - Replacement	-	\$35,000.00	\$21,000.00
GenePoint Lab Generators	12/23/2016	-	-	\$60,000.00	\$36,000.00
<input type="checkbox"/> Stage: Perception Analysis (1 record)				\$120,000.00	
Express Logistics SLA	9/24/2016	Existing Customer - Upgrade	External Referral	\$120,000.00	\$84,000.00
<input type="checkbox"/> Stage: Proposal/Price Quote (2 records)				\$370,000.00	
University of AZ Installations	9/26/2016	Existing Customer - Upgrade	Employee Referral	\$100,000.00	\$75,000.00
United Oil Refinery Generators	12/14/2016	Existing Customer - Upgrade	-	\$270,000.00	\$202,500.00
<input type="checkbox"/> Stage: Negotiation/Review (2 records)				\$395,000.00	
United Oil Office Portable Generators	10/30/2016	Existing Customer - Upgrade	-	\$125,000.00	\$112,500.00
United Oil Installations	10/26/2016	Existing Customer - Upgrade	-	\$270,000.00	\$243,000.00
<input type="checkbox"/> Stage: Closed Won (18 records)				\$3,645,000.00	

Finally click on Save button.

To edit Salesforce report click on customize button.

What is a Salesforce Matrix report?

Salesforce Matrix report is similar to Summary reports and is the most complex Salesforce report format where records data is summarized in a grid format. Matrix reports allow records to be summarize data by both columns and rows.

Salesforce Matrix report is used to compare related tools.

Matrix reports can be used as the source report for Dashboard components.

These are used to summarize large amounts of data.

How to create matrix report in Salesforce.com?

In Summary report we can not group data by rows and columns so we go for matrix reports. Login Salesforce and navigate to Setup | Reports | Create new report.

Here we are going to create Salesforce Matrix report for the object opportunity. We can convert Summary report to matrix report.

As shown below in matrix report, row is grouped by Stage and column in grouped by Close date. This is the advantage of matrix reports.

The screenshot shows the Salesforce Matrix Report builder. At the top, there are filter settings for 'Close Date' (set to 'All Time'), 'Opportunity Status' (set to 'Any'), and 'Probability' (set to 'All'). Below the filters is a section titled 'To add filters, click Add.' The main area is titled 'Preview' and shows a matrix report for opportunities. The rows are grouped by 'Stage' (Prospecting, Qualification, Value Proposition, Id. Decision Makers, Proposal/Price Quote, Negotiation/Review) and the columns are grouped by 'Close Date' (Q3 FY2016, Q4 FY2016, Grand Total). The matrix displays various metrics like Sum of Amount, Record Count, and Amount. A red box highlights the 'Grand Total' column in the header and the bottom-right corner of the matrix data area. The data includes rows for different companies like Pyramid Emergency Generators, Dickenson Mobile Generators, Express Logistics Portable Truck Generators, Grand Hotels Guest Portable Generators, Grand Hotels Kitchen Generator, GenePoint Lab Generators, United Oil Refinery Generators, United Oil Office Portable Generators, and United Oil Installations, with their respective lead sources, expected revenue, next step, probability, and fiscal period.

		Close Date	Q3 FY2016	Q4 FY2016	Grand Total	Opportunity Name	Lead Source	Expected Revenue	Next Step	Probability (%)	Fiscal Period	
Stage	Prospecting	Drop a field here to create a row grouping.	Sum of Amount	\$0.00	\$100,000.00	\$100,000.00	Pyramid Emergency Generators	Phone Inquiry	\$10,000.00	-	10%	Q1-2015
		Record Count		1	\$100,000.00	1	Dickenson Mobile Generators	Purchased List	\$1,500.00	-	10%	Q1-2015
Qualification	Value Proposition	Drop a field here to create a row grouping.	Sum of Amount	\$0.00	\$15,000.00	\$15,000.00	Express Logistics Portable Truck Generators	External Referral	\$40,000.00	-	50%	Q1-2015
		Record Count		1	\$15,000.00	1	Grand Hotels Guest Portable Generators	Employee Referral	\$125,000.00	-	50%	Q2-2015
Id. Decision Makers	Proposal/Price Quote	Drop a field here to create a row grouping.	Sum of Amount	\$80,000.00	\$250,000.00	\$330,000.00	Grand Hotels Kitchen Generator	-	\$9,000.00	-	60%	Q1-2015
		Record Count		1	\$80,000.00	1	GenePoint Lab Generators	-	\$36,000.00	-	60%	Q2-2015
Negotiation/Review		Drop a field here to create a row grouping.	Sum of Amount	\$15,000.00	\$60,000.00	\$75,000.00	United Oil Refinery Generators	-	\$202,500.00	-	75%	Q2-2015
		Record Count		1	\$15,000.00	1	United Oil Office Portable Generators	-	\$112,500.00	-	90%	Q1-2015
		Drop a field here to create a row grouping.	Sum of Amount	\$0.00	\$270,000.00	\$270,000.00	United Oil Installations	-	\$243,000.00	-	90%	Q1-2015
		Drop a field here to create a row grouping.	Record Count									

Here we got information what is the total amount and what is the sum of total amount for a special stage. If we want an

information what is the total amount for a particular closed date.

Here close date is grouped by fiscal year. We summarized amount information below. We can add more fields for row and column grouping.

Conditional highlighting in Matrix reports.

Conditional Highlighting is a powerful way to show values in report within given limits. We can specify colours for different ranges of values in reports using conditional highlighting.

Click on show drop down and select Conditional Highlighting.

The color to show data for low breakpoint and high break point must be defined as shown below.

Now the result report will be displayed as shown below.

Preview Matrix Format Show Add Chart Remove All Columns

		Close Date	Q3 FY2016	Q4 FY2016	Grand Total
Stage	Drop a field here to create a row grouping.	Drop summarizable fields into the matrix.			
Prospecting		Sum of Amount Record Count	\$0.00 0	\$100,000.00 1	\$100,000.00 1
		Amount Record Count		\$100,000.00 1	
Qualification		Sum of Amount Record Count	\$0.00 0	\$15,000.00 1	\$15,000.00 1
		Amount Record Count		\$15,000.00 1	
Value Proposition		Sum of Amount Record Count	\$80,000.00 1	\$250,000.00 1	\$330,000.00 2
		Amount Record Count	\$80,000.00 1		
		Amount Record Count		\$250,000.00 1	
Id. Decision Makers		Sum of Amount Record Count	\$15,000.00 1	\$60,000.00 1	\$75,000.00 2
		Amount Record Count	\$15,000.00 1		
		Amount Record Count		\$60,000.00 1	
Proposal/Price Quote		Sum of Amount Record Count	\$0.00 0	\$270,000.00 1	\$270,000.00 1
		Amount Record Count		\$270,000.00 1	
Negotiation/Review		Sum of Amount Record Count	\$0.00 0	\$395,000.00 2	\$395,000.00 2
		Amount Record Count		\$125,000.00 1	
		Amount Record Count		\$270,000.00 1	
Closed Won		Sum of Amount Record Count	\$330,000.00 3	\$1,895,000.00 8	\$2,225,000.00 11
		Amount Record Count	\$220,000.00 1		
		Amount Record Count	\$60,000.00 1		

Finally click on Run report button.
Let Save the report.

Salesforce Dashboard:

Salesforce Dashboard is the visual representation of snapshots that are generated from Salesforce reports data. Using Salesforce Dashboard components we can convert business requirements in Graphical representation using

salesforce reports like tabular reports, matrix report, summary report and joined report.

Different Salesforce Dashboard Components?

In salesforce, Report data can be presented in graphical elements. Graphical elements are also known as Dashboard components. Different Salesforce Dashboard Components are Charts, Gauges, Tables, Metrics and Visualforce Pages. We can add up to 20 components to Salesforce dashboard.

Chart :- In Chart component, Report data is displayed in different chart types like Horizontal bar chart, vertical bar chart, line chart, pie chart, Donut chart and Funnel Chart.

Gauge :- In gauge component, the data show how far you are from reaching a goal. Gauge component types may be used to show a single value that is to be shown as a part of a range of custom set values. Here the ranges that can be set can represent, say, low, medium, and high values, and the value from the report plotted accordingly.

Metric :- Metric component types may be used to show a single value to display.

Table :- Table component types may be used to show a set of report data in column form.

Visualforce page :- In addition to the standard types, Visualforce page component types may be used to create a custom component type and present information in a way not available in the standard dashboard component types.

Salesforce Dashboards are two types dashboard and Dynamic Dashboards. Dynamic Dashboard in Salesforce are used to display information to a specific user using security settings.

Salesforce Dashboards are stored in Folders.

Dashboard folder can be hidden, public or restricted to public groups.

Dashboards won't refresh automatically unless it is set to do.

Salesforce dashboards can be delivered through Email.

How to create a dashboard in Salesforce?

To create a Dashboard in Salesforce user must have source reports data to build new dashboard. To create Salesforce dashboard login Salesforce and follow the steps given below.

 Navigate to Dashboard tabs | Click on New Dashboard.

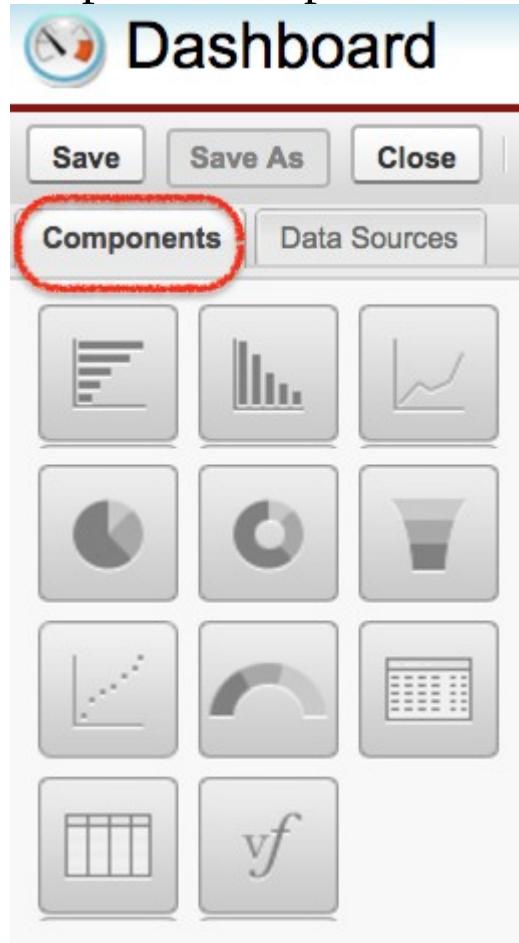
The screenshot shows the Salesforce Reports & Dashboards interface. At the top, there is a navigation bar with tabs: Home, Pharma Products, Hospitals, Invoices, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red oval. Below the navigation bar, the main title is 'Reports & Dashboards'. There are two buttons: 'New Report...' and 'New Dashboard...', with 'New Dashboard...' also highlighted by a red oval. On the left side, there is a sidebar titled 'Folders' with a search bar labeled 'Find a folder...'. Below the search bar is a section titled 'All Folders' containing a list of report and dashboard categories: Unfiled Public Reports, My Personal Custom Reports, My Personal Dashboards, SP Hospital and SP Sales Team Reports, Opportunity Reports, Sales Reports, Lead Reports, Support Reports, Campaign Reports, Administrative Reports, Activity Reports, SP Product and Asset Reports, Call Center Reports, and File and Content Reports. On the right side, there is a section titled 'All Folders' with a search bar labeled 'Find reports and dashboards...'. A table header with columns 'Action' and 'Name' is shown, followed by the message 'No records to display.'

When we click on New Dashboard button a new page will be opened where user can select Components and Data Sources.

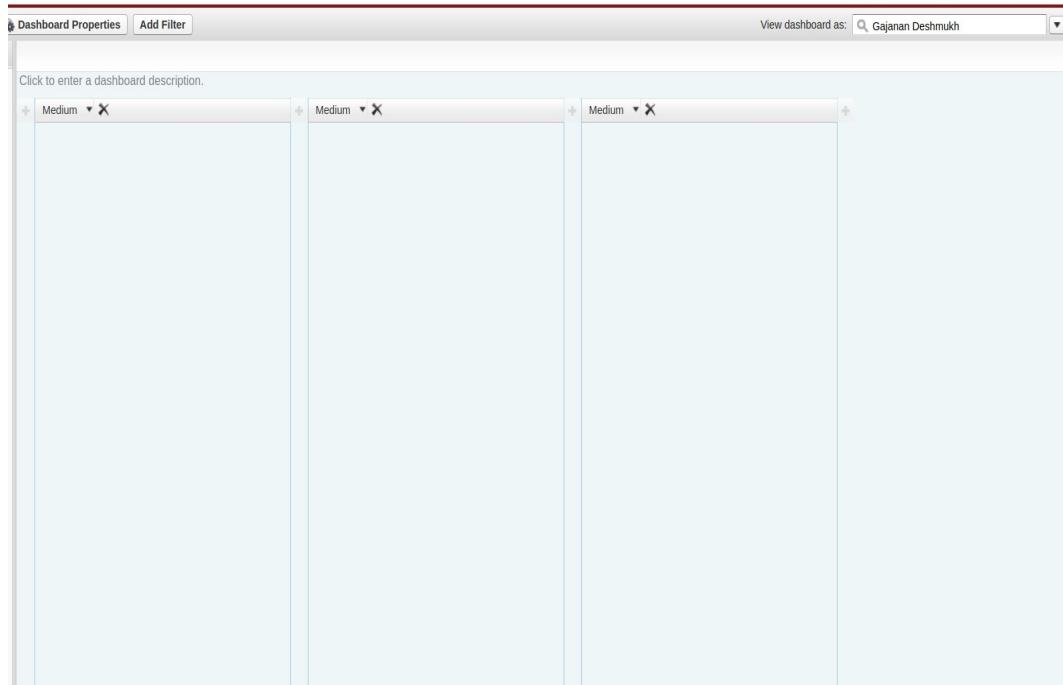
Data Source is the pre-prepared source reports containing the data you wish to display in Salesforce dashboard. These source reports are stored in folders that your intended dashboard viewers have access or they will not be able to view the information.

Now go to Data Source | Reports | My personal Custom Reports.

Now we have to choose the Data component. Now drag and drop the Component on the data source.



Now drag and drop the component and Data source as shown below. We can add up to 20 components to Salesforce dashboard.

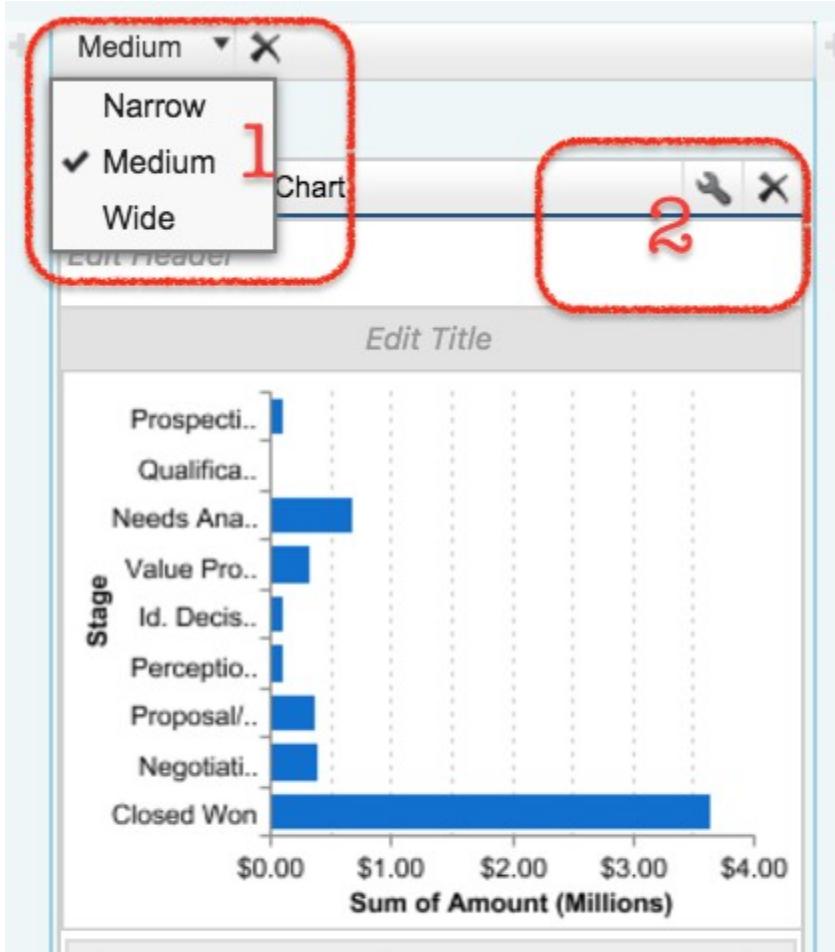


The most important concept that to be remembered while creating Salesforce dashboard is to understand how do we customize the dashboard to show the information that we need.

Customizing Salesforce Dashboard.

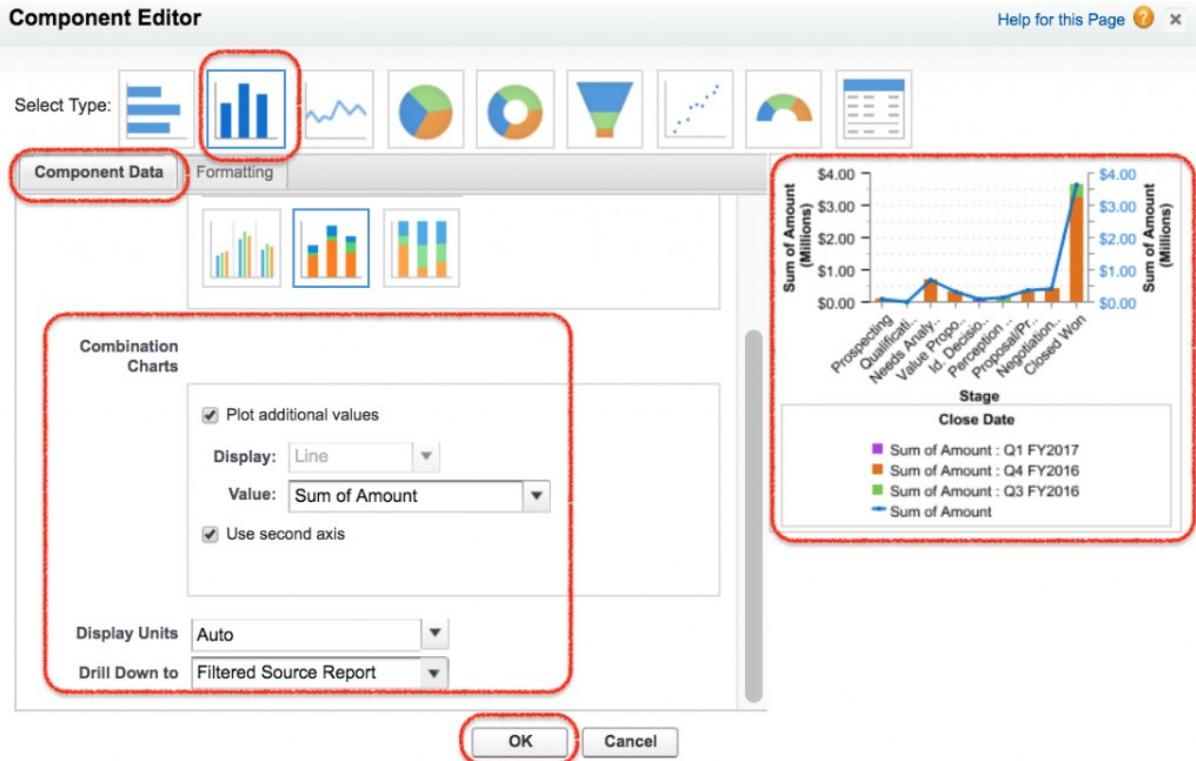
We have options called Narrow, medium and wide. We can select any option to get better view of the dashboard.

We have another two icons called Edit and Delete.



Now click on Edit button we will find editor. Here we have two sections called component data and Formatting.

Component data : Here we define X-Axis, Y-axis, grouping by any field, combination chart, display units and drill down data.



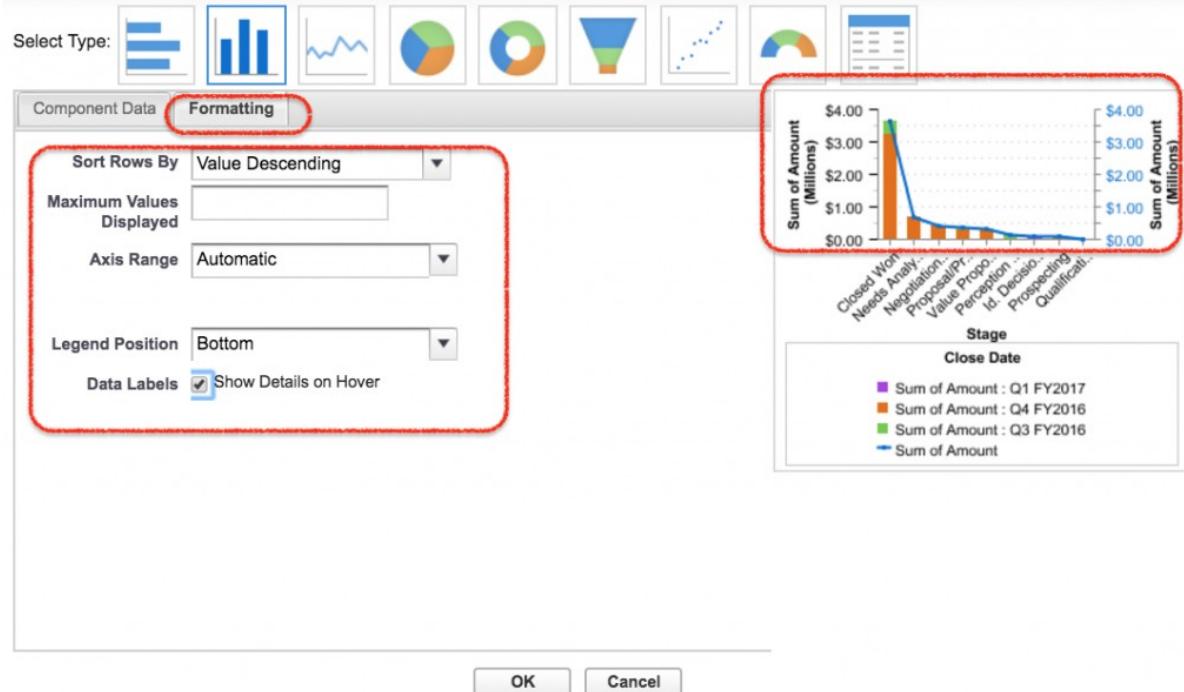
As shown above in component data in X- Axis we have selected Sum of Amount, Y- Axis we have selected Stage and the data is grouped by Closed Data.

Enter required values and finally click on **Save button.**

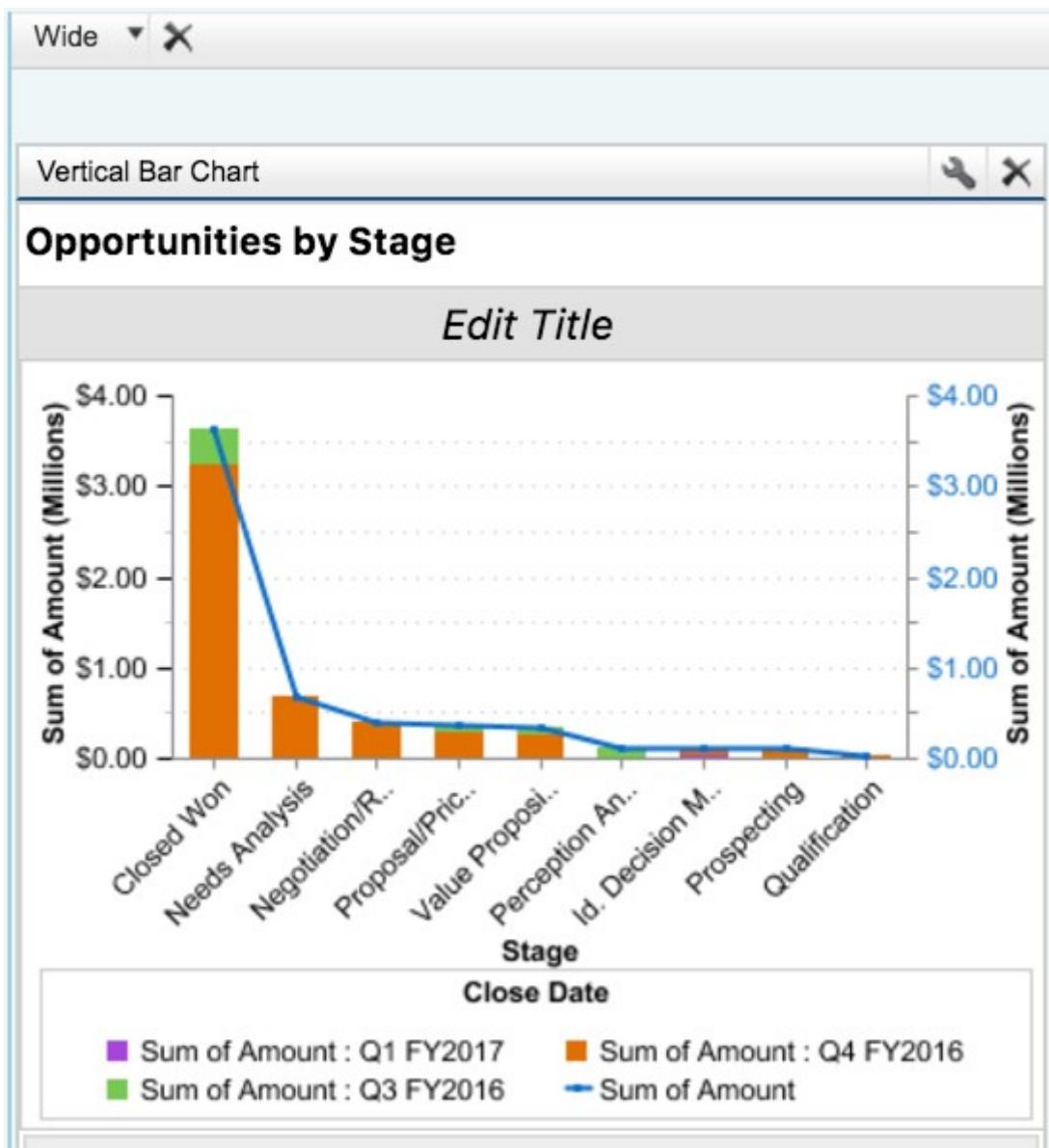
Formatting :- In formatting we can sort rows by ascending or descending and legend position.

Component Editor

Help for this Page ? ×

**OK** **Cancel**

Enter Description and footer to your Salesforce Dashboard.



Now finally click on Save button.

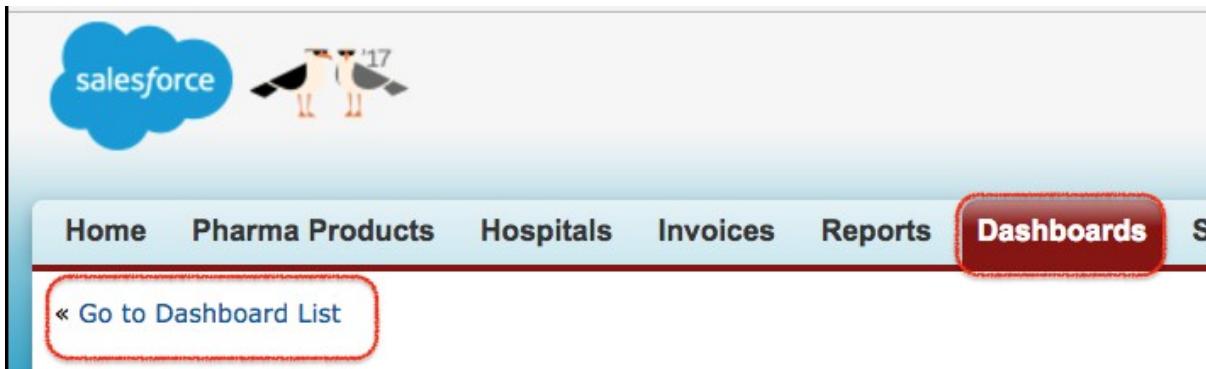
What Dynamic Dashboard in Salesforce?

Dynamic Dashboard in Salesforce are used to display information to a specific user using Security settings. Dynamic Salesforce dashboards can be made to visible to a specific user or as a logged in user.

Creating Dynamic Dashboard in Salesforce?

Depending up on the Salesforce Edition, Dynamic dashboard will be available. In Enterprise edition there are five dynamic dashboards and in unlimited edition there are 10 dynamic dashboards.

To create dynamic dashboard in Salesforce login to Salesforce.com and navigate to Dashboard | dashboards lists.



Now list of all Dashboard will be displayed.
Click on Edit button as shown below.

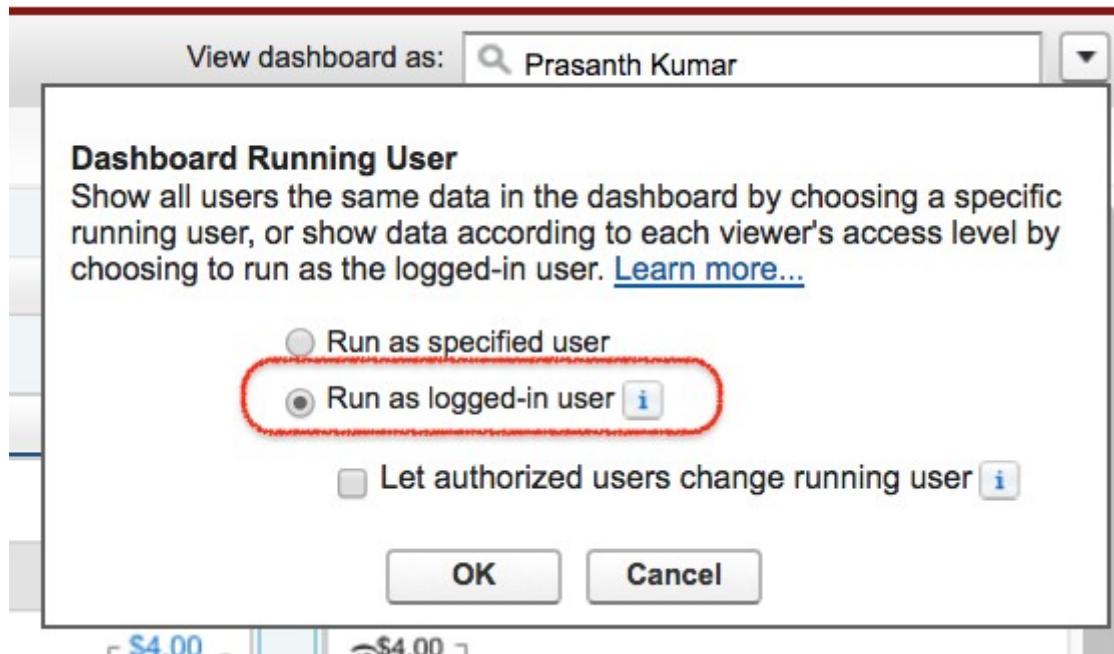
A screenshot of the 'Reports & Dashboards' page. On the left, there's a sidebar titled 'Folders' with a search bar and a list of 'All Folders' including 'Unfiled Public Reports', 'My Personal Custom Reports', and 'My Personal Dashboards' (which is circled in red). The main area is titled 'My Personal Dashboards' and shows a table with one row. The table has columns for 'Action', 'Name', and 'Created By'. The row contains a small thumbnail, the name 'Salesforce Dashboard for Summary report', and 'My Personal Da... Kumar, Prasanth'. Below the table are 'Edit' and 'Delete' buttons, both of which are circled in red.

Now click on the button next to the View dashboard as field and select Run as Logged-in user option as shown below.

Optionally, select Let authorized users change running user to enable those with permission to change the running user on the dashboard view page.

Click on OK.

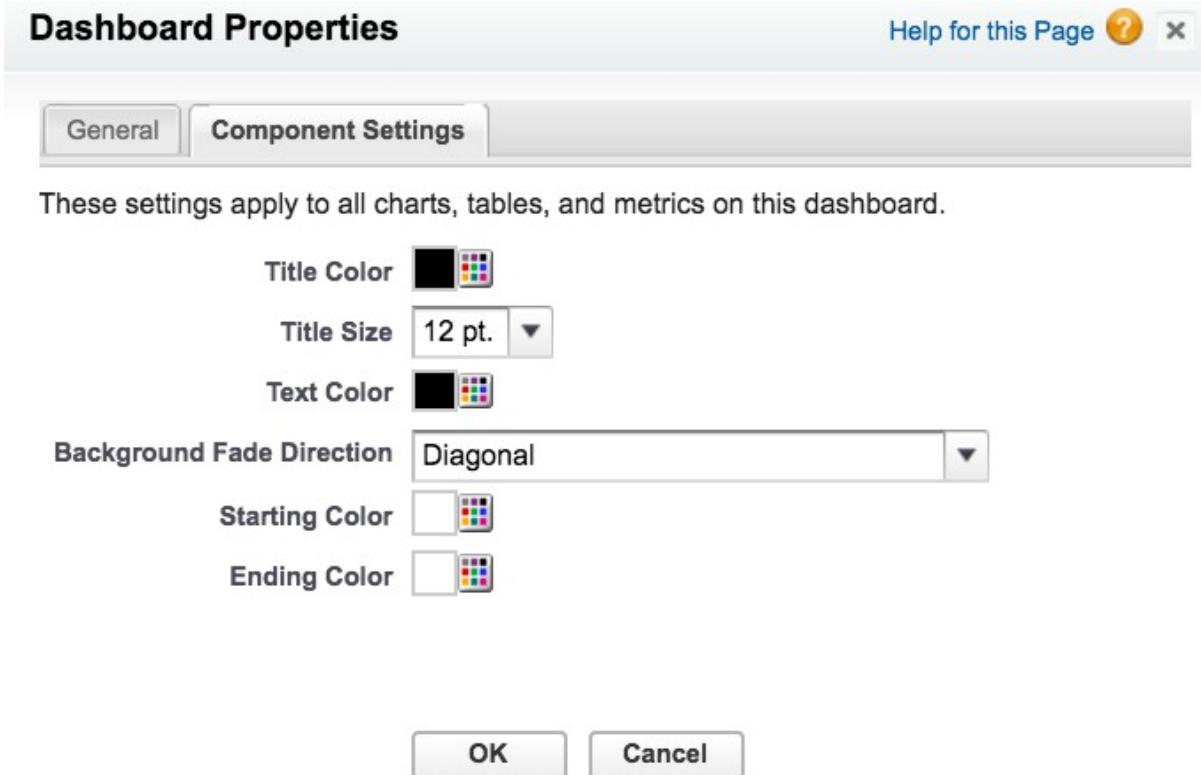
In the View dashboard as field, enter a running user.



Save the dashboard.

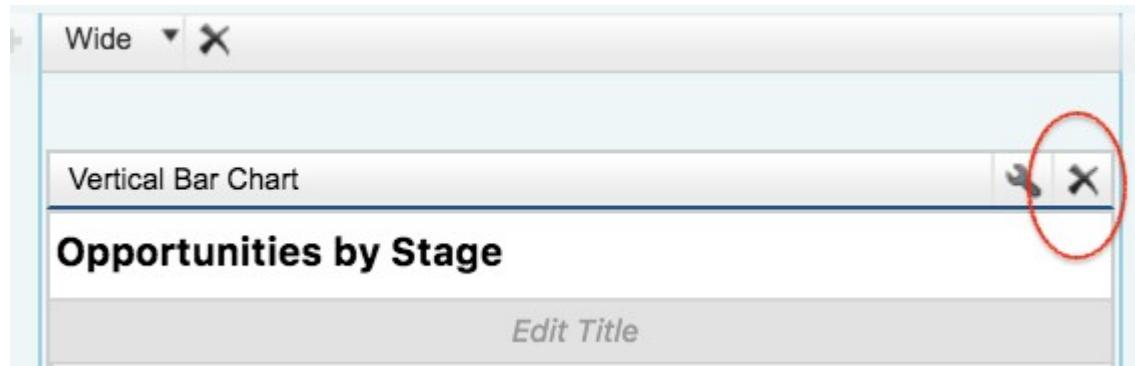
Customizing Salesforce dashboard is very simple. We can edit, delete, Print and can set dashboard properties. Dashboard title colour, Size, background fade and text color can be done at component settings.

Navigate to [Dashboard Properties](#) | [Component Settings](#).



Deleting and Printing Salesforce Dashboard.

To delete Salesforce dashboard navigate to Dashboard Tab | Dashboard lists | Go to dashboard folder.



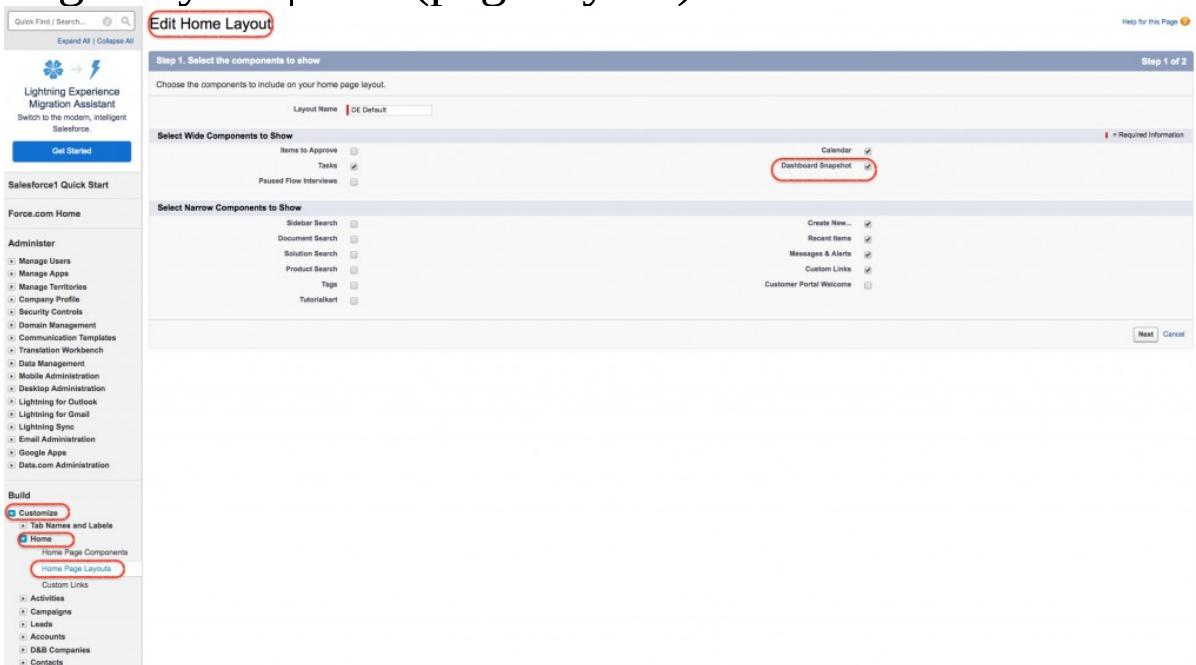
Click on X to delete your Salesforce dashboard.

Printing Salesforce dashboard.

Salesforce dashboard can be printed using web browser option. And the paper orientation to print must be set to landscape so that it is wide enough to fit all three columns of the dashboard.

Adding Salesforce dashboard Home page.

Created Salesforce Dashboard can be added to home page.
To add navigate to Setup | Build | Customize | Home | Home Page Layout | Edit (page layout).



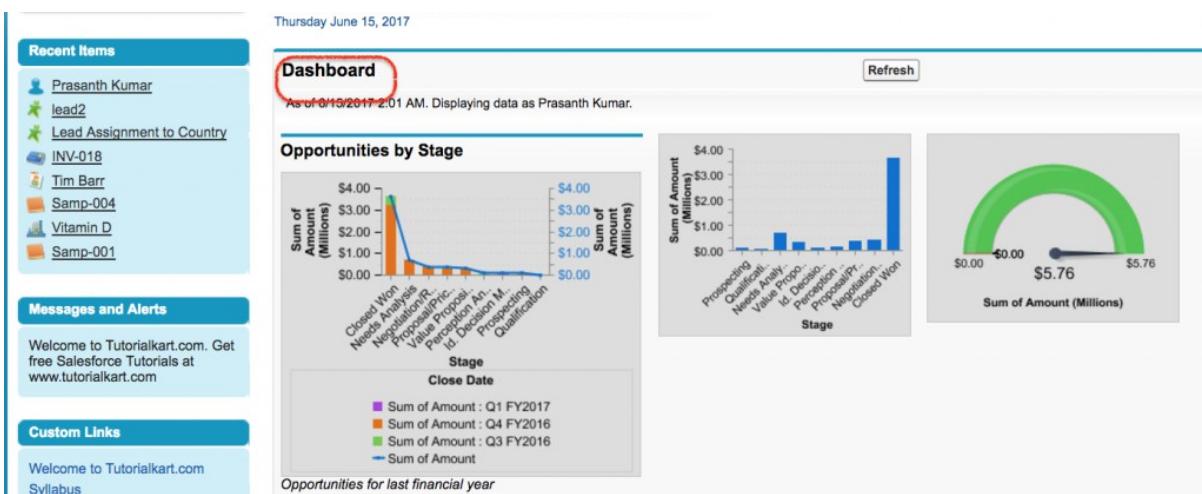
Check Dashboard Snapshot to add on Home Page Layout.

Click on next button.

Now move the position.

Click on Save button.

Now go to Home page.



Now we see Salesforce dashboard on home page.