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.

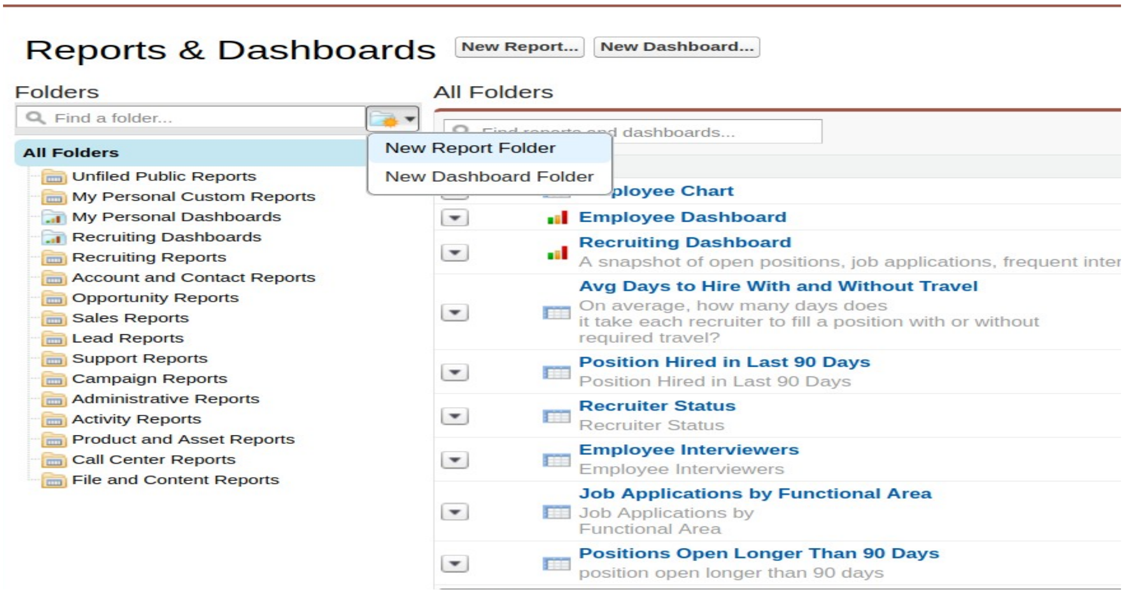
So why would you want to use a matrix report? If you’re looking for an at-a-glance overview of data, especially for something like totals of revenue or quantity of products sold, then the matrix report format is for you.

Joined Reports:

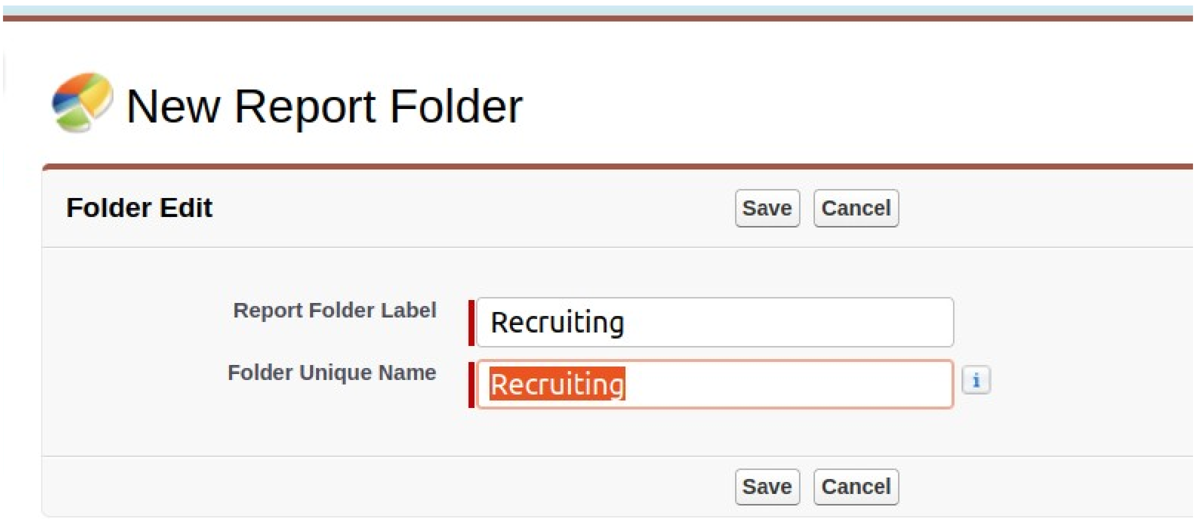
Joined reports let you create different views of data from multiple report types. In a joined report, data is organized in blocks. Each block acts like a “sub-report,” with its own fields, columns, sorting, and filtering. You can add a chart to a joined report.

How to create Salesforce reports custom folder?

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

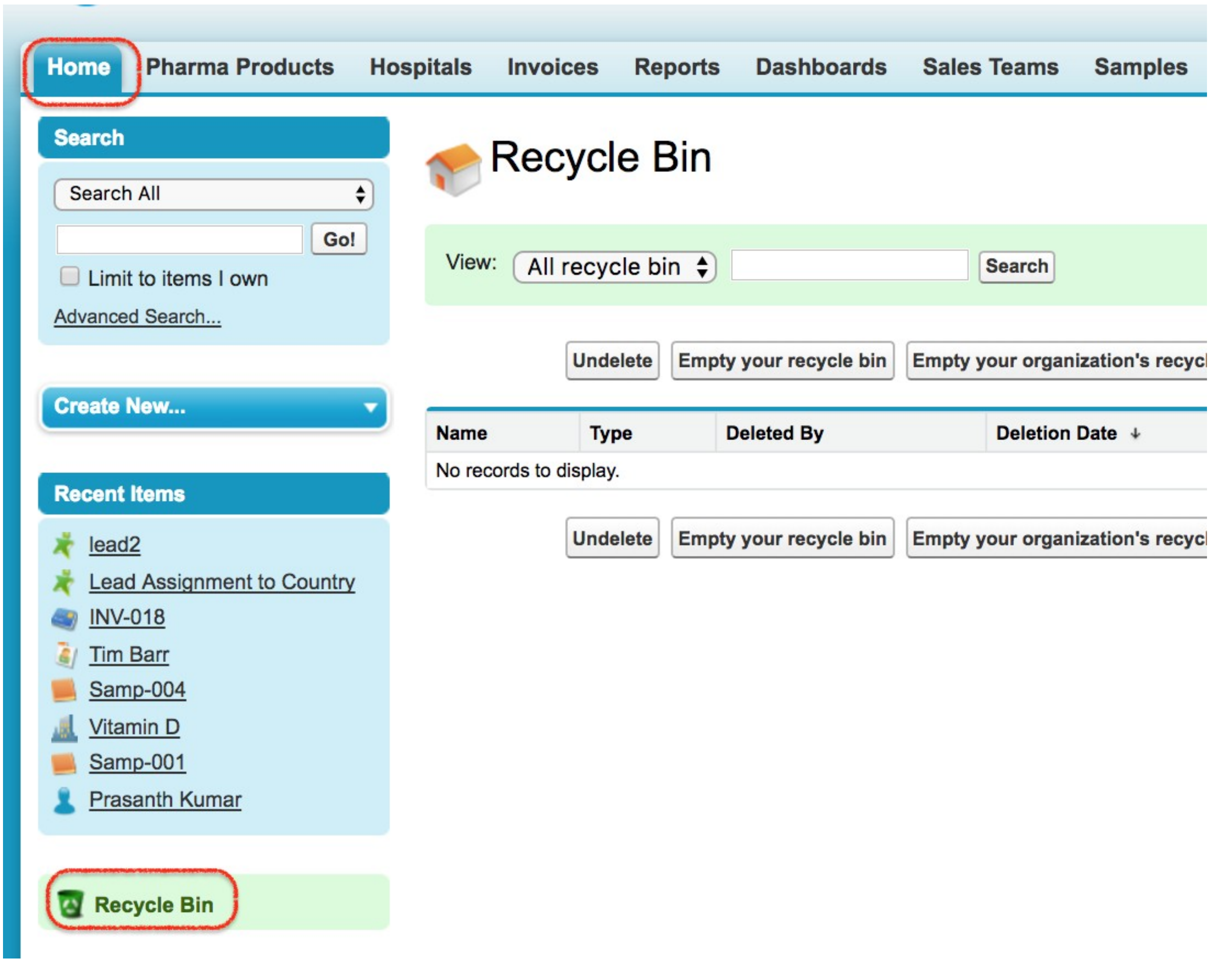


Enter report folder name and unique name as desires. Click on **Save button**.



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.



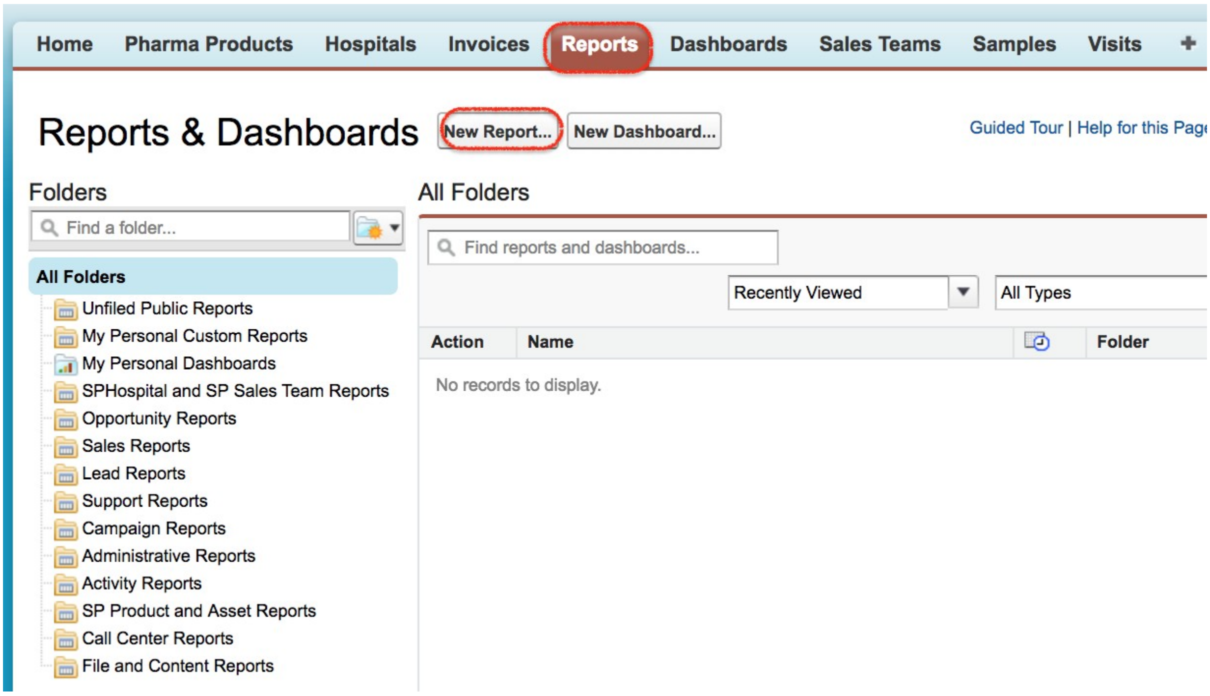
Salesforce Report Area.

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.

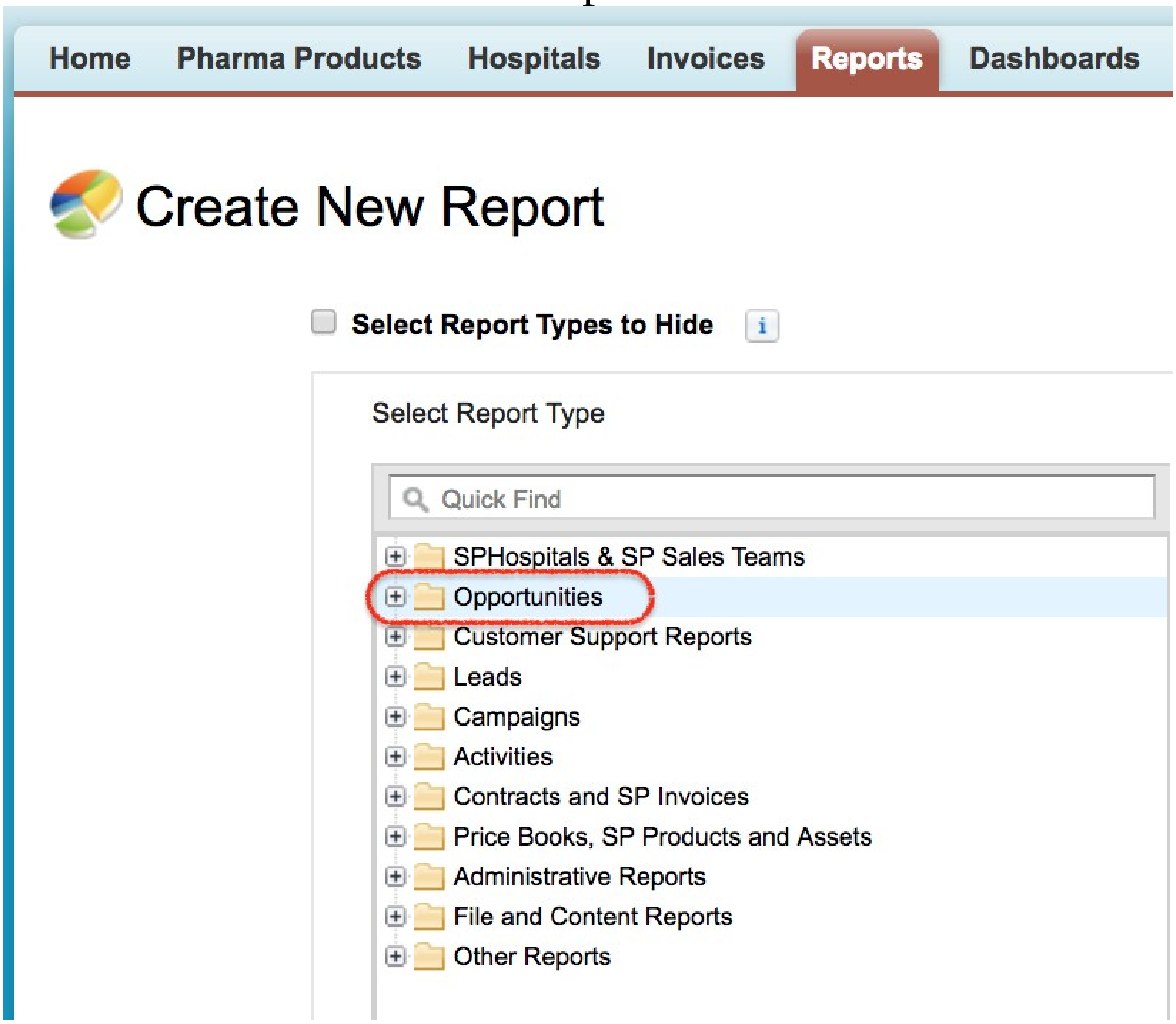
Control Area.
Quick find.
Data tab.
Standard Filter Area.
Report filter area.
Report data preview area.
Report Selection.

How to create Tabular report format in Salesforce.



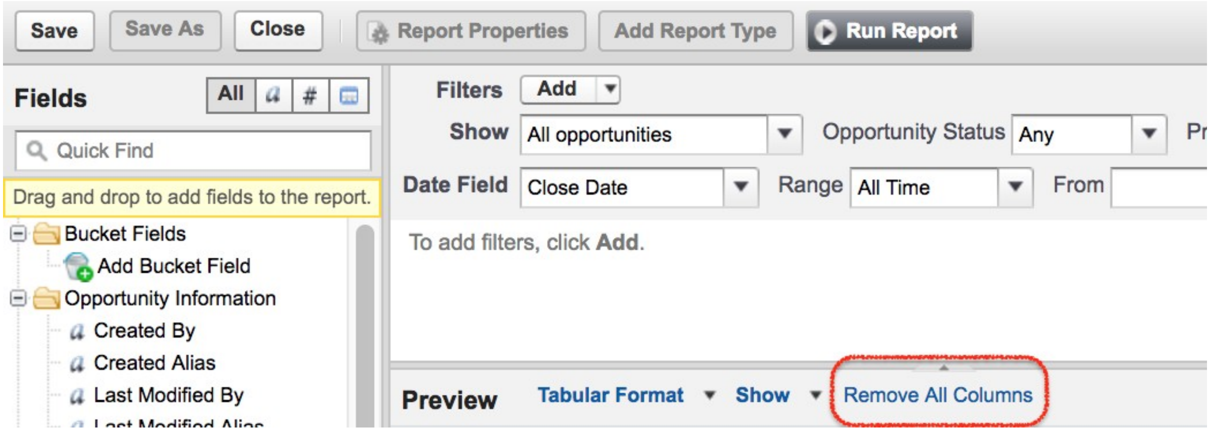
To create Tabular Report in Salesforce, login salesforce with username and password. Now Navigate toSetup | Reports.

Now Click on New report as shown above.

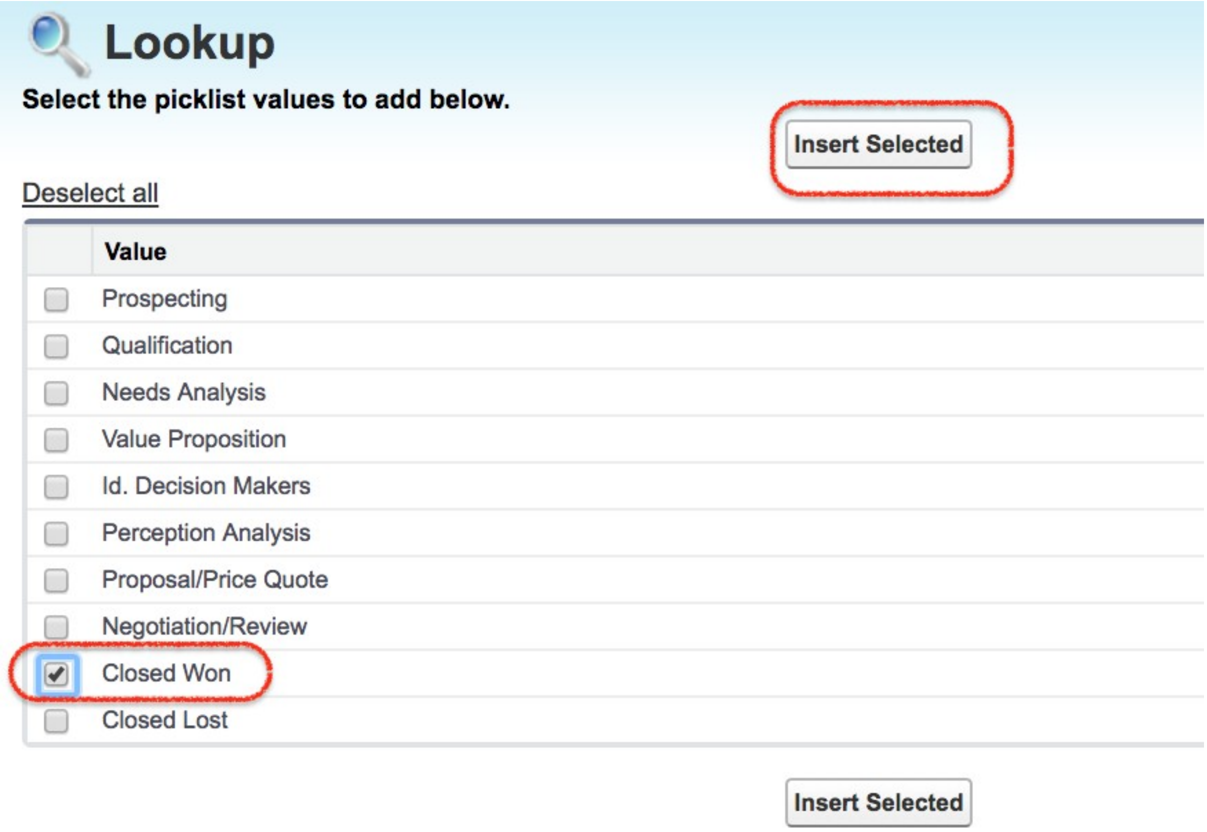


Select the report type that to be created. we creating Tabular report for Opportunities.

Click on Create button.



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 opportunites stage closed to own.
Select Stage equals to Closed own as shown below.
Select Closed Won and click on insert selected.



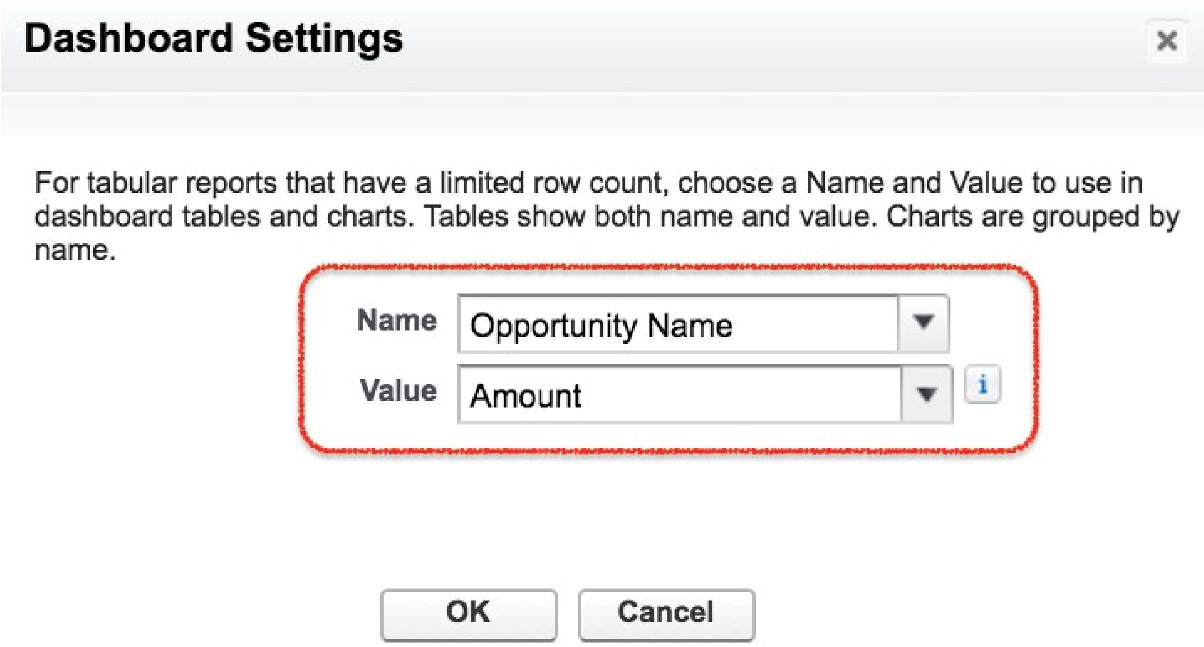
As shown below we have selected four field to the column area.

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.

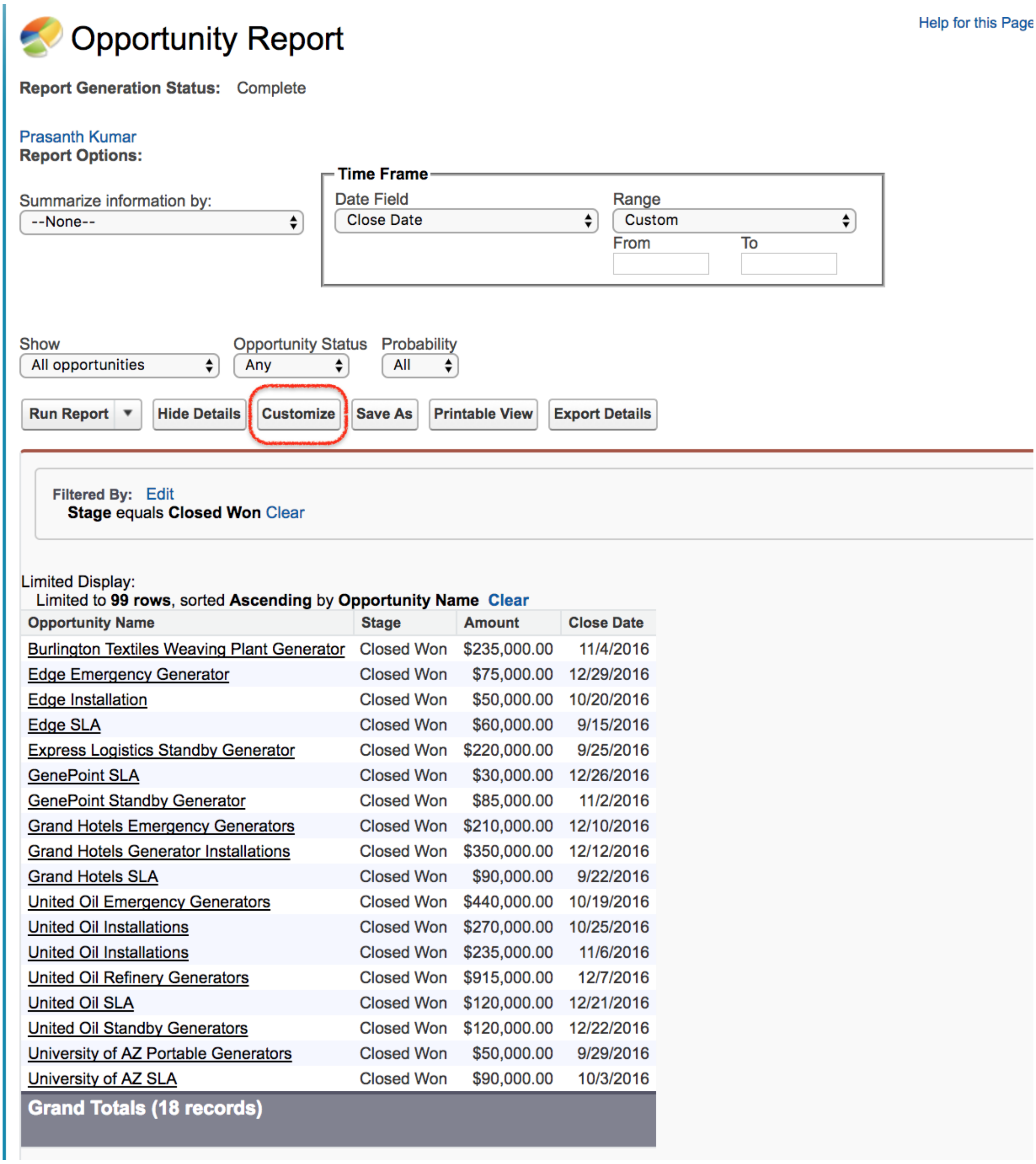


Enter name as Opportunity Name and value as Amount.

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.

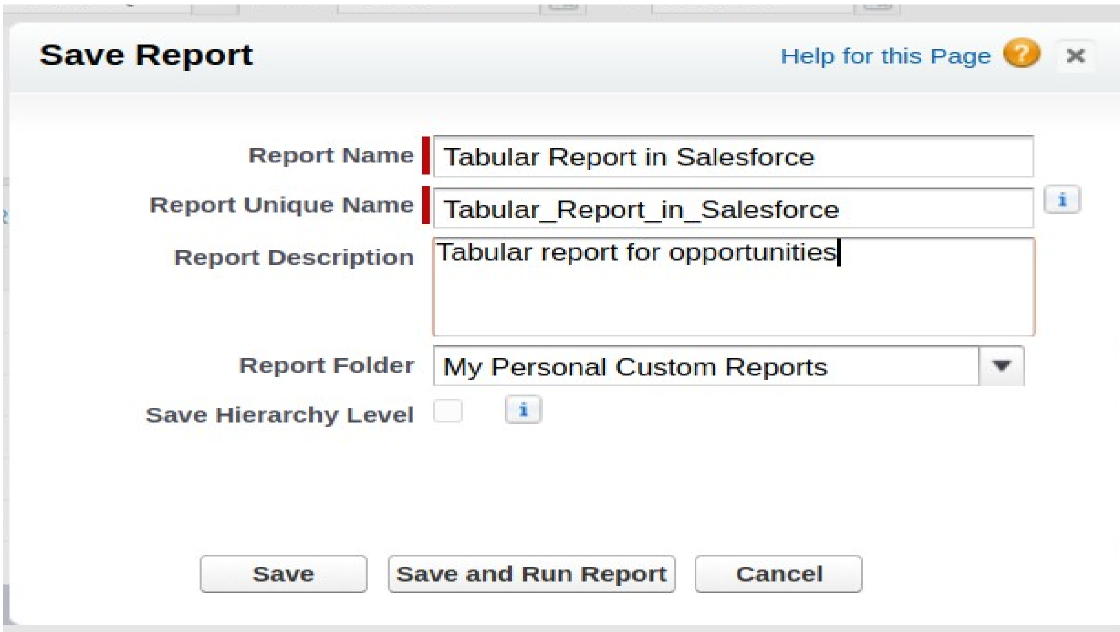


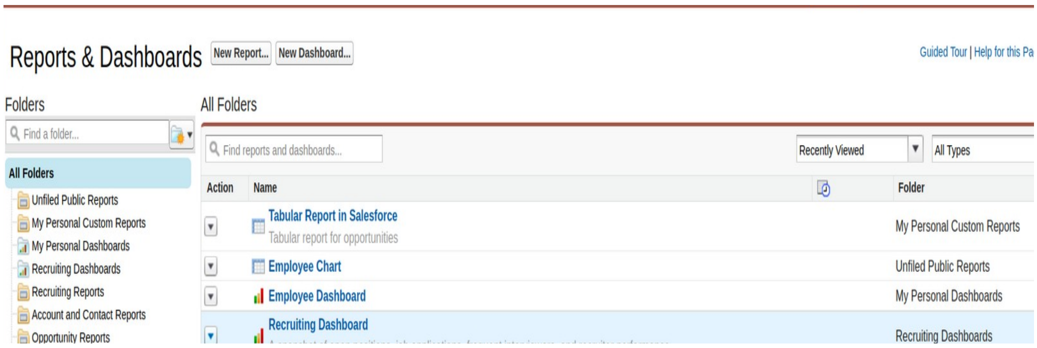
Opportunity Name	Stage	Amount	Close Date
Burlington Textiles Weaving Plant Generator	Closed Won	$235,000.00	11/4/2016
Edge Emergency Generator	Closed Won	$75,000.00	12/29/2016
Edge Installation	Closed Won	$50,000.00	10/20/2016
Edge SLA	Closed Won	$60,000.00	9/15/2016
Express Logistics Standby Generator	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.





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.

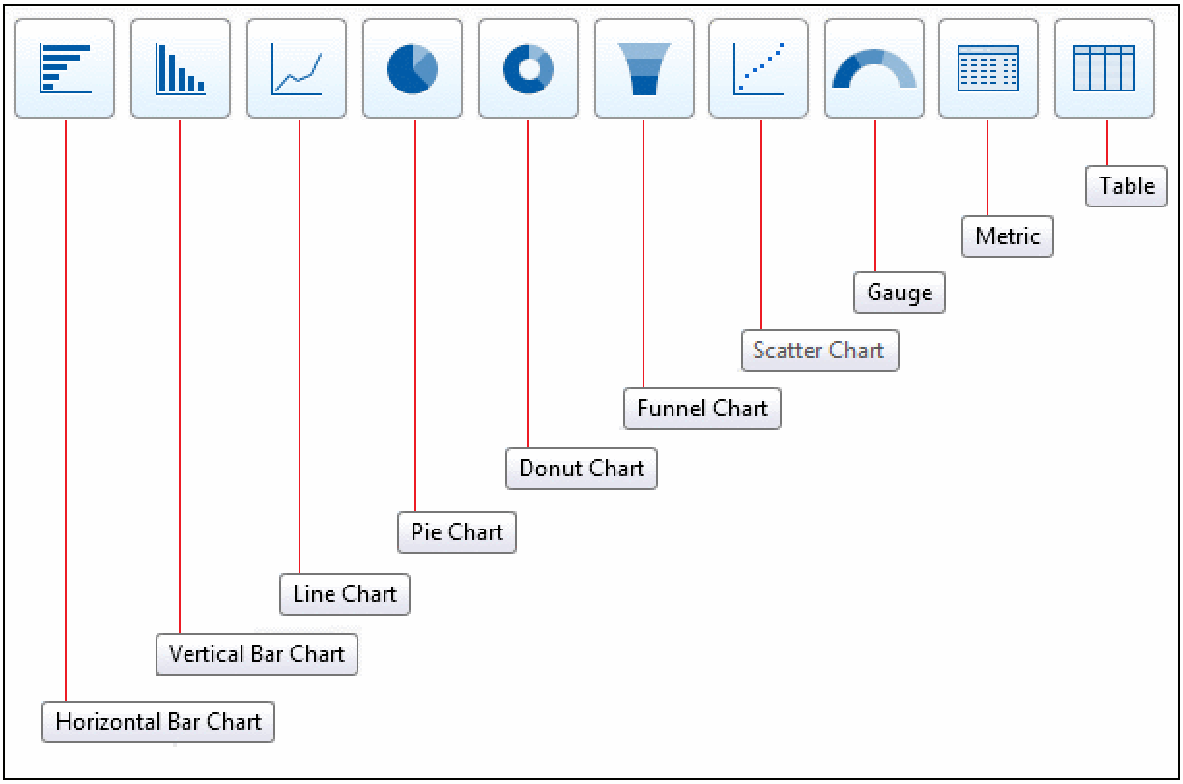
Salesforce Reports and Dashboards.

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

Standard Report types and
Custom Report Types.

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

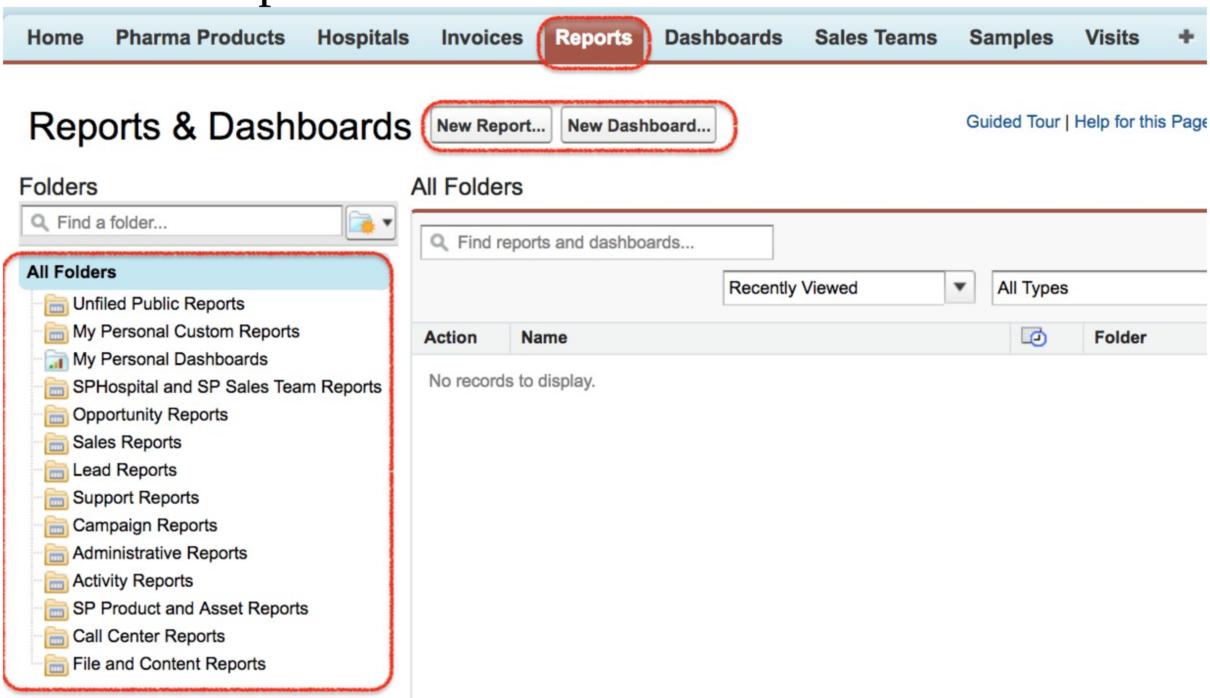
Accounts	Activities	Contacts
Call Center Reports	Campaign	Salesforce CRM Content
Leads	Opportunities	Pricebook

Products	Assets	Administrative Reports

How to create Reports using Report Builder in Salesforce?

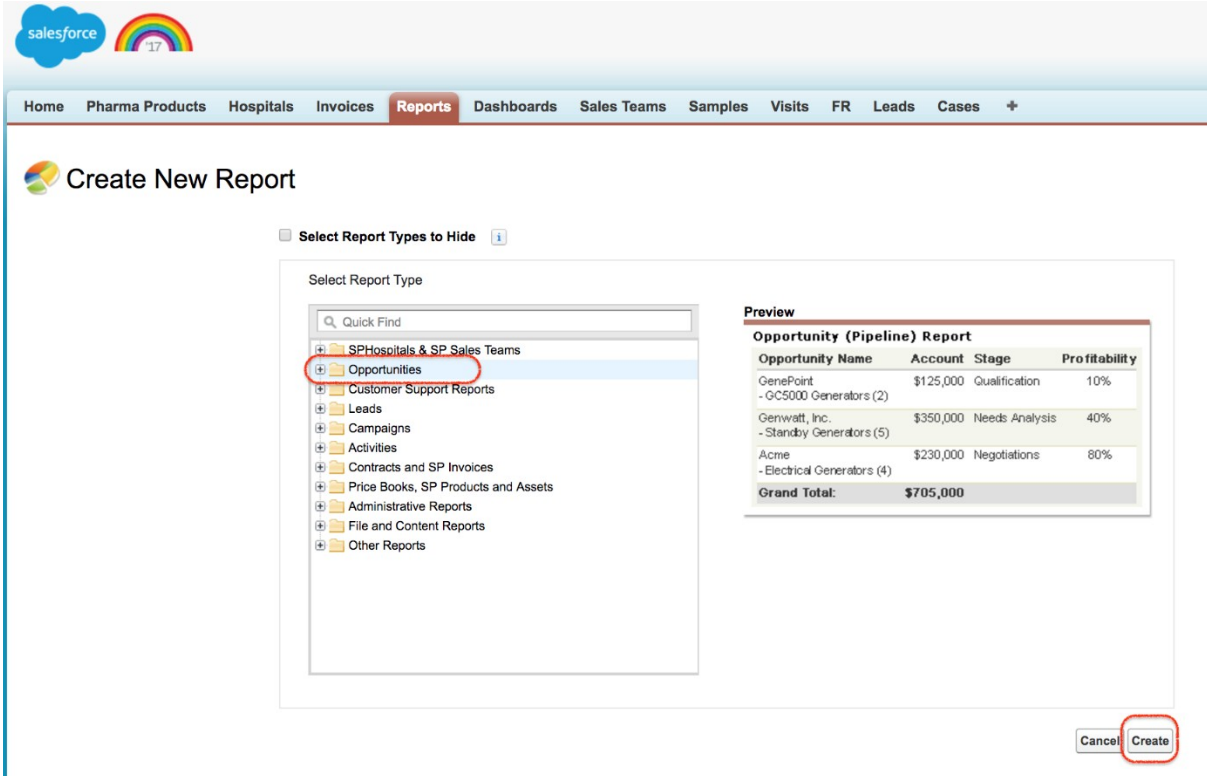
Salesforce reports and dashboards are stored in folders. We can also create new custom folder for reports and Dashboards.

Click on Reports as shown below.



Folders are used to for grouping 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.

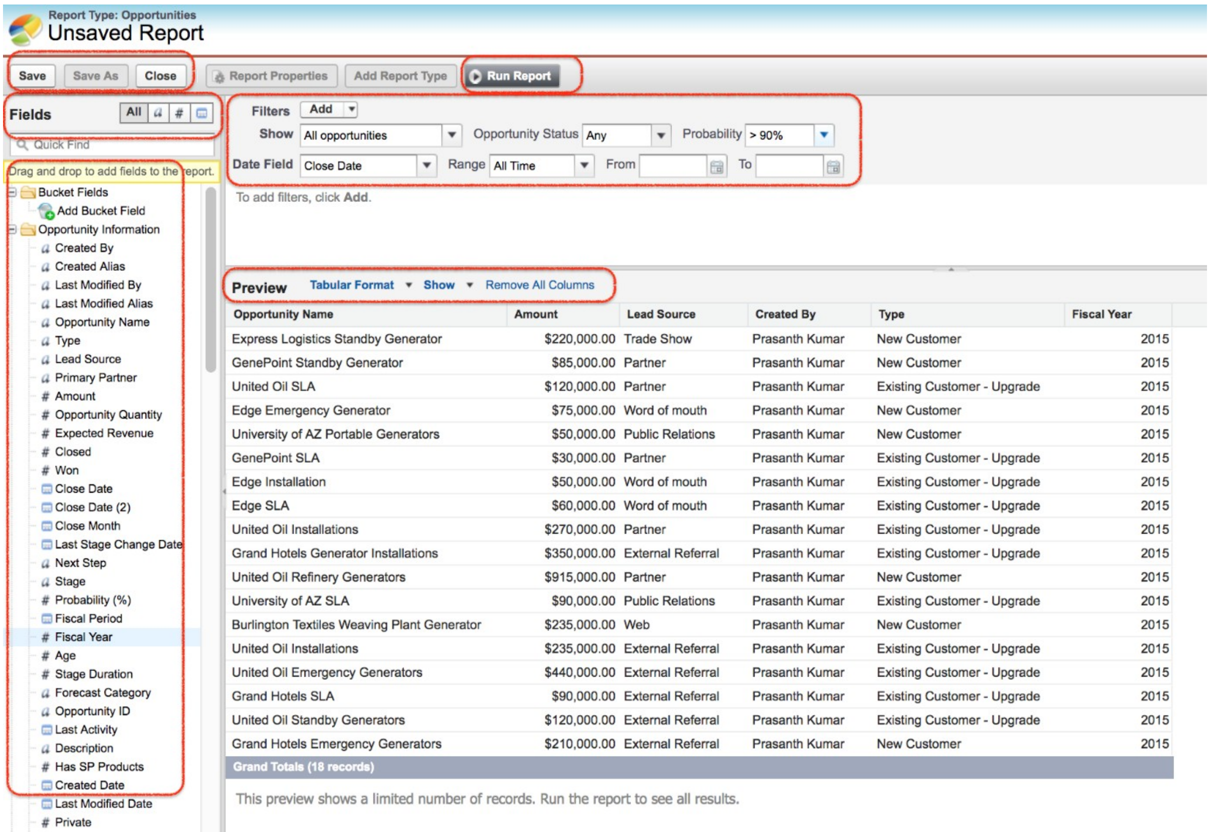
Click on New report button as shown above.



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 relationshiop between a primary object and it’s 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.



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 onAll 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.

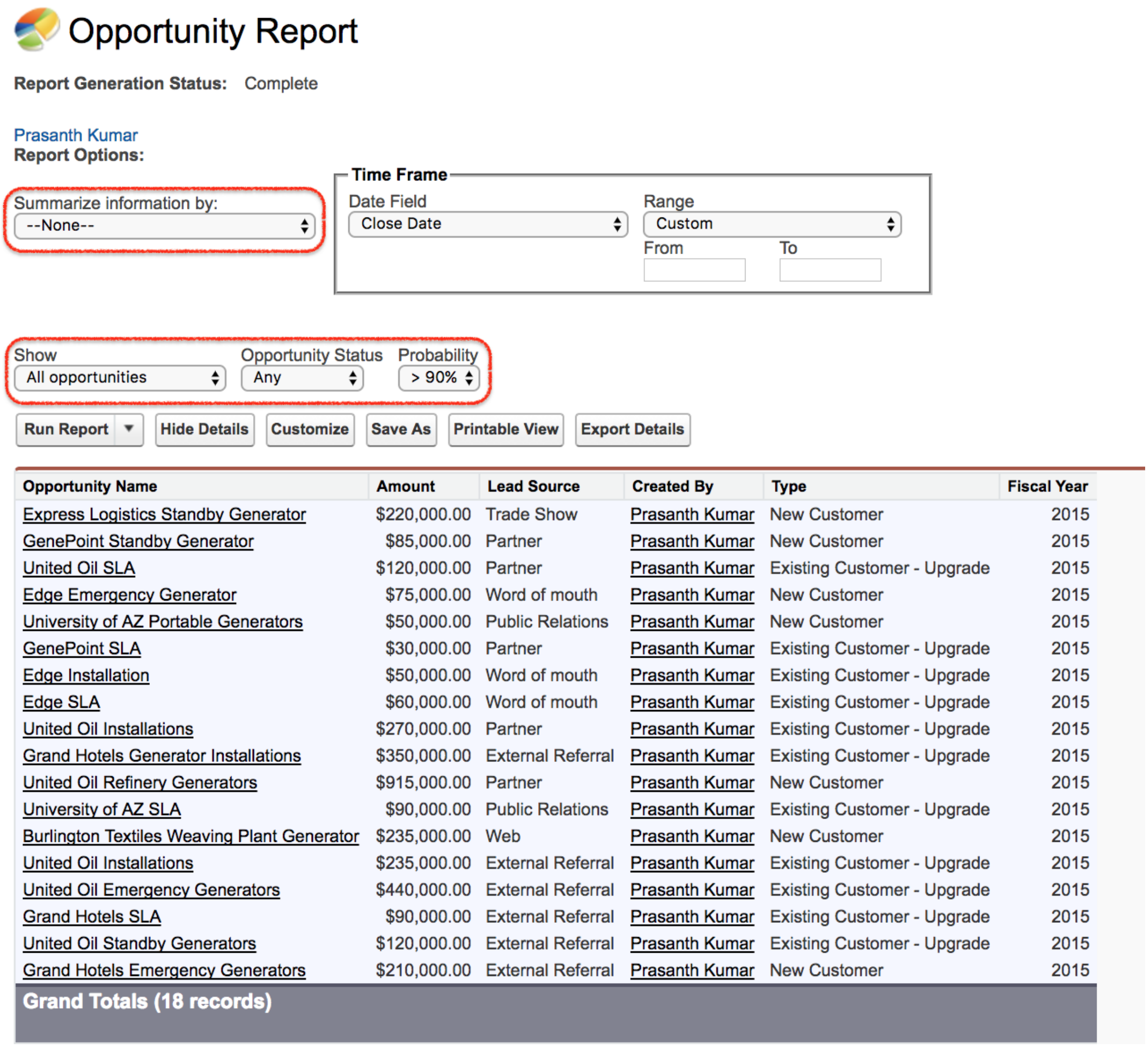
Add filter to the report and also select data field to which the reports are to be displayed.

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

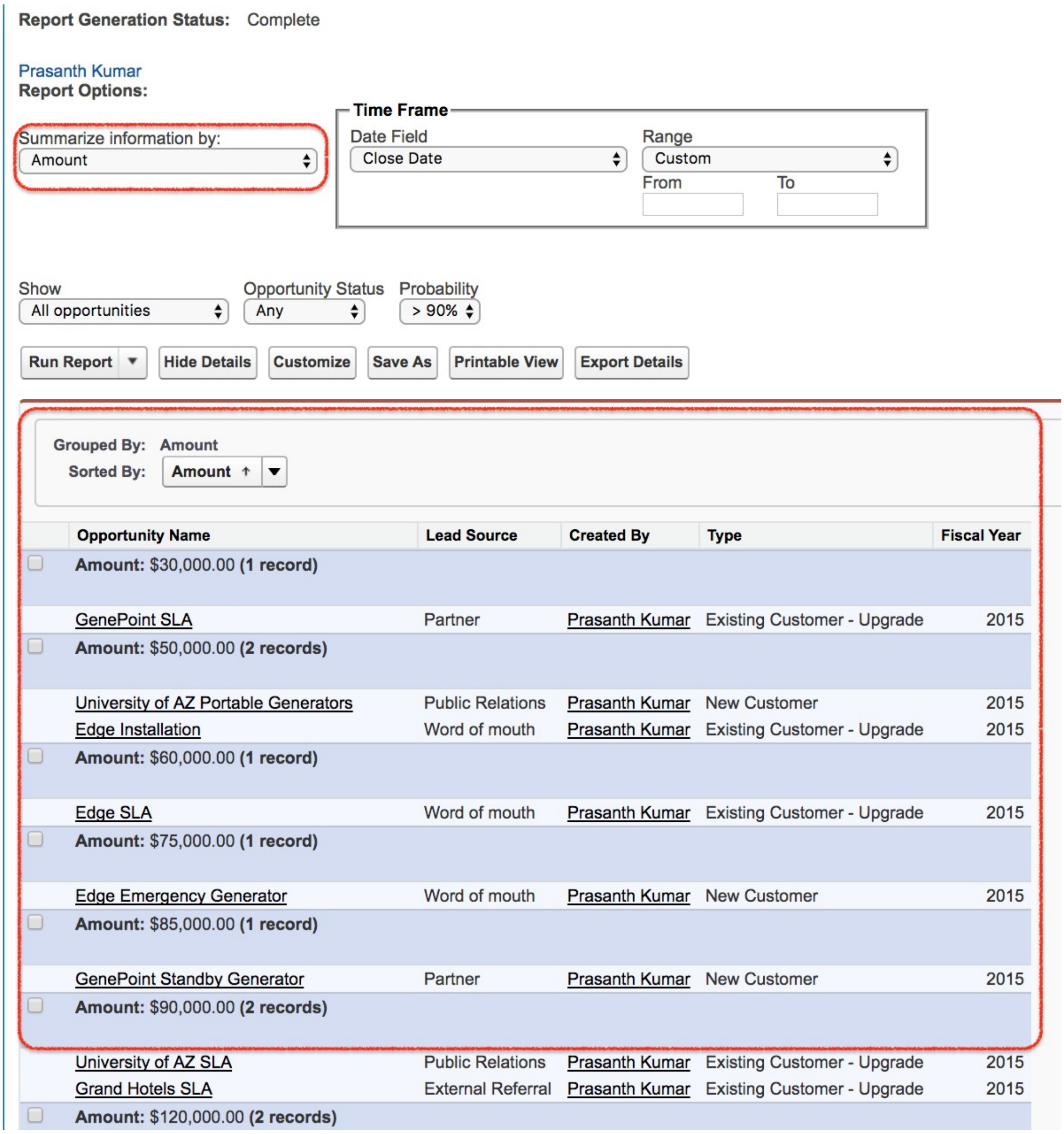
Opportunity Status: Any

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.



We can also download the report file.

Summary Reports:

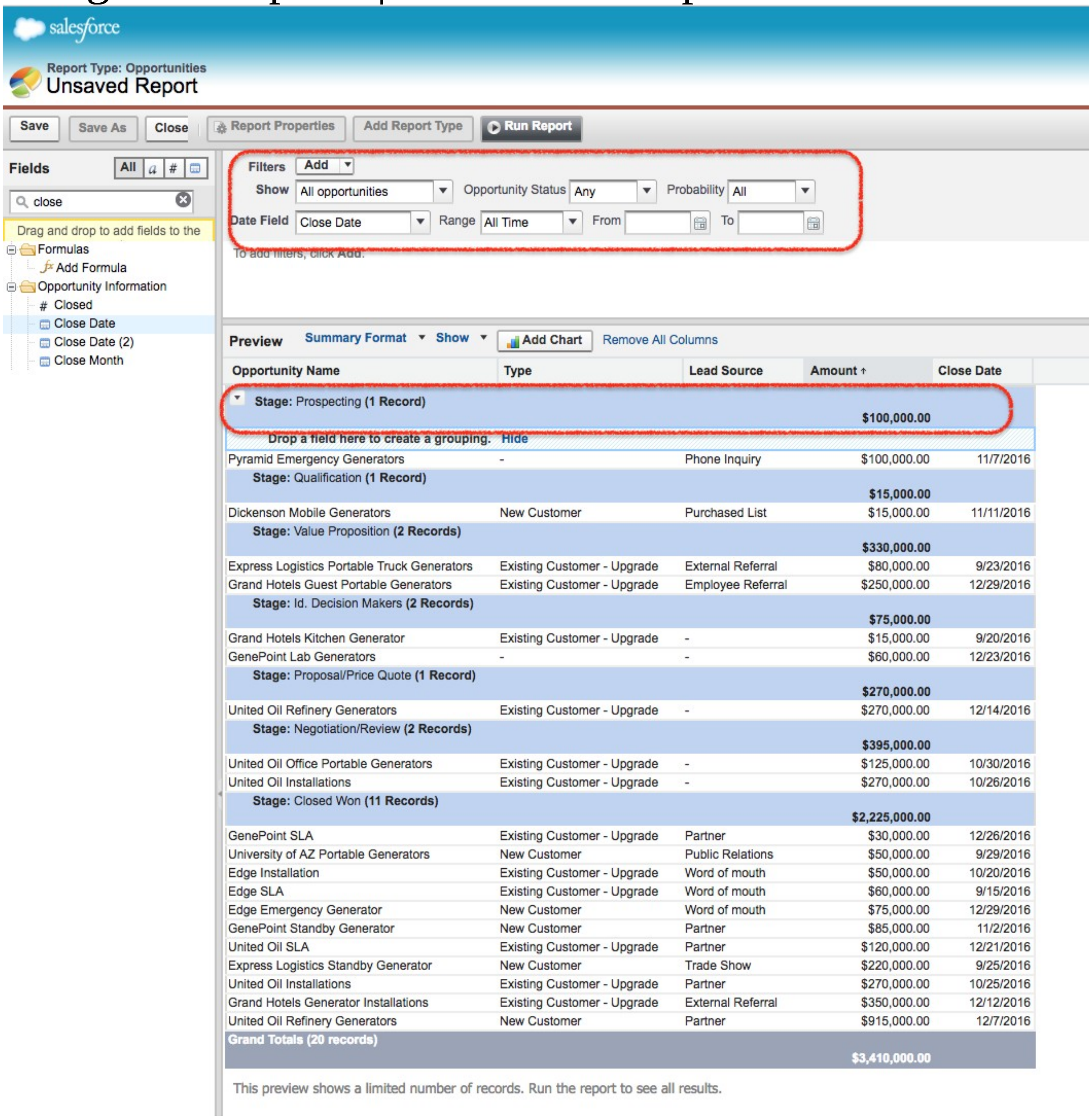
Summary reports are similar to Tabular Reports but these reports allows grouping of rows data. Rows data can be grouped up to four levels.

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 toReports | Create new Report.



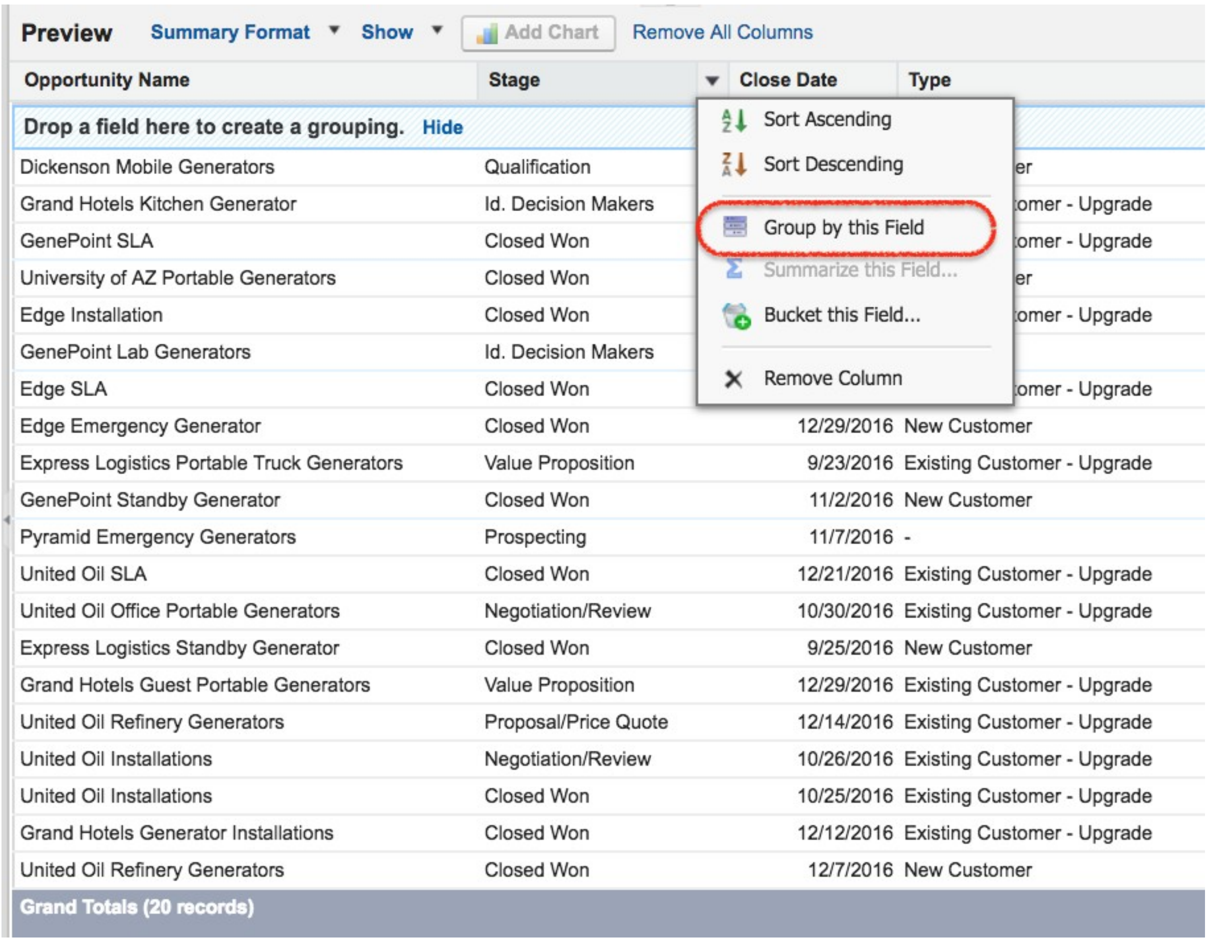
How to add Summary fields to preview pane ?

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

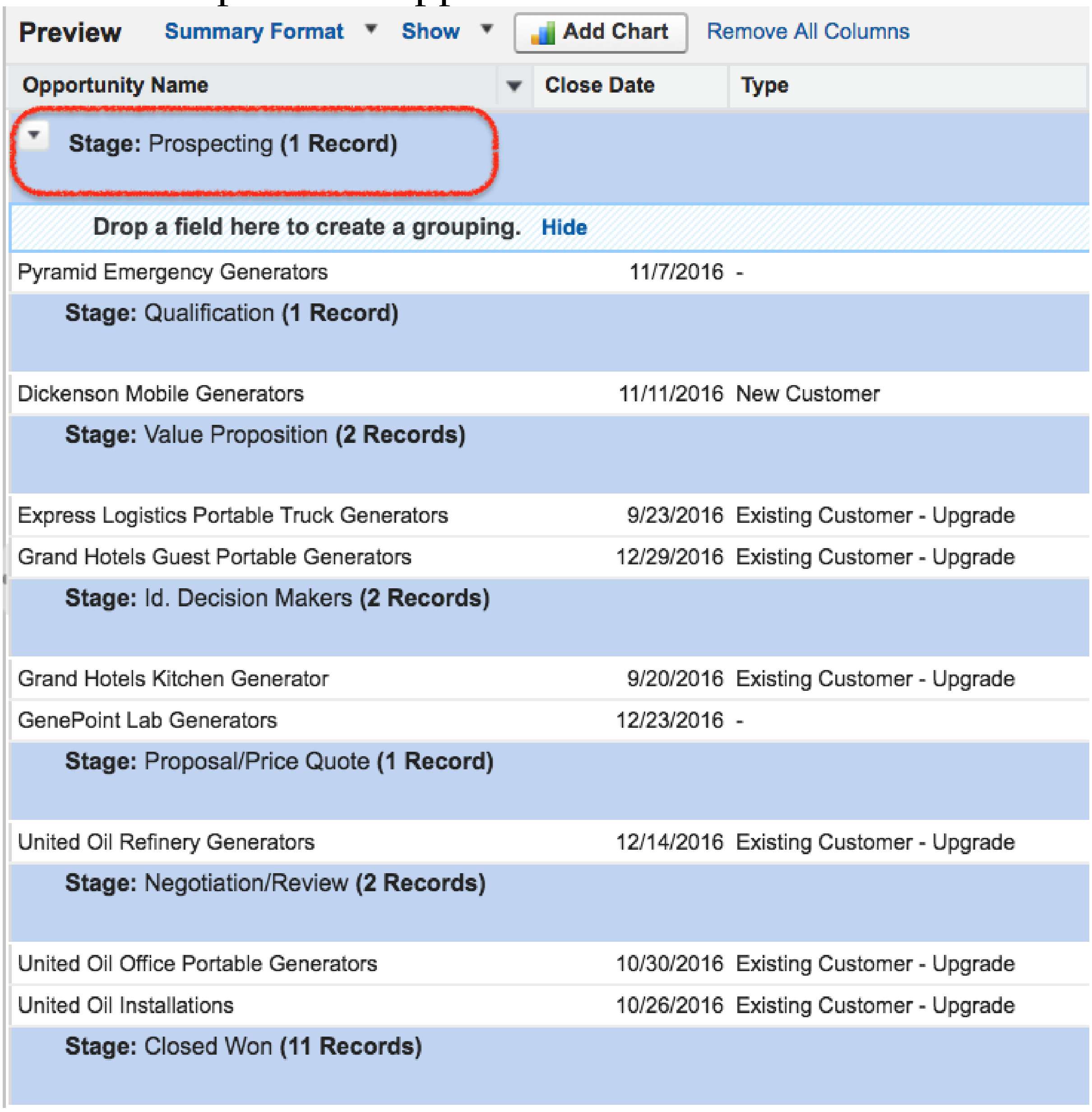
Drag OpportunityName, Type, Lead Source, Amount, Probability, closed data from field pane to grouping section of the preview pane.
Wait for the loading dialog to complete.

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.



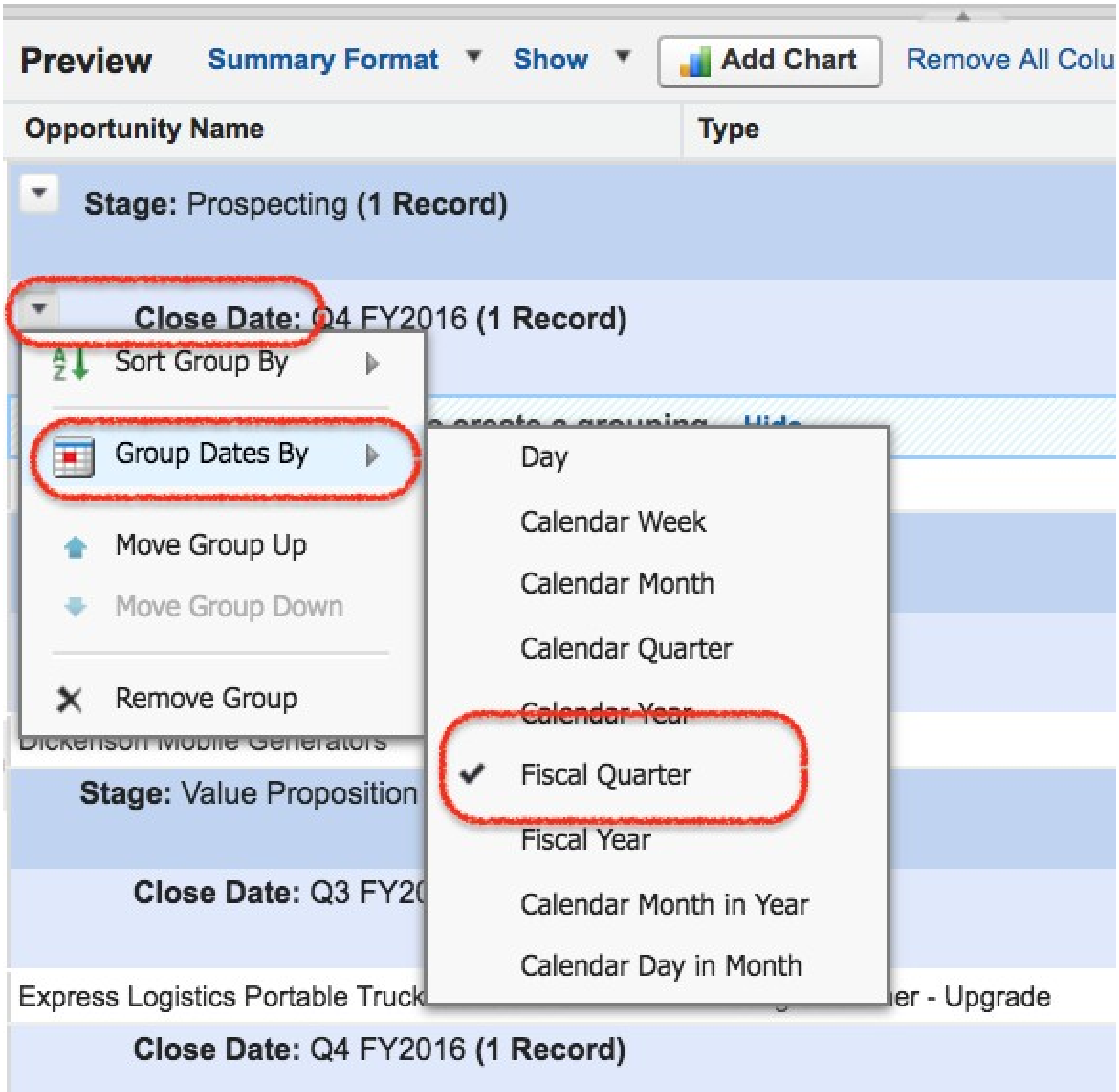
Now the report will appear as shown below.


Preview Summary Format Show Add Chart Remove All Columns

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)**		

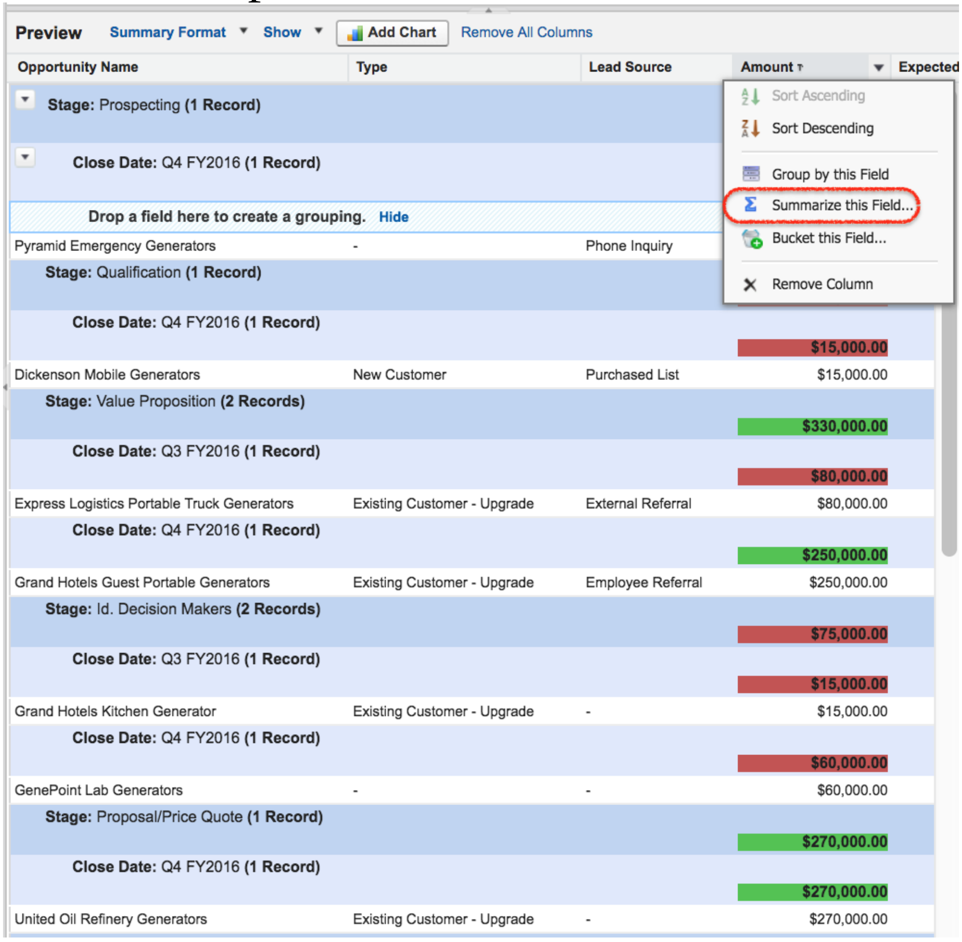
We have grouped rows data based on opportunity Stage. Drag and drop Stage field to group rows data. Salesforce Summary reports can have up to four grouping levels. Summary field is the currency field used to SUM, AVERAGE, MIN or Max for a number and to group levels including grand total levels for reports.

We have grouped data by another field byClosed data.



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.



Now pop up menu will be displayed.

Select Sum and click on apply button.

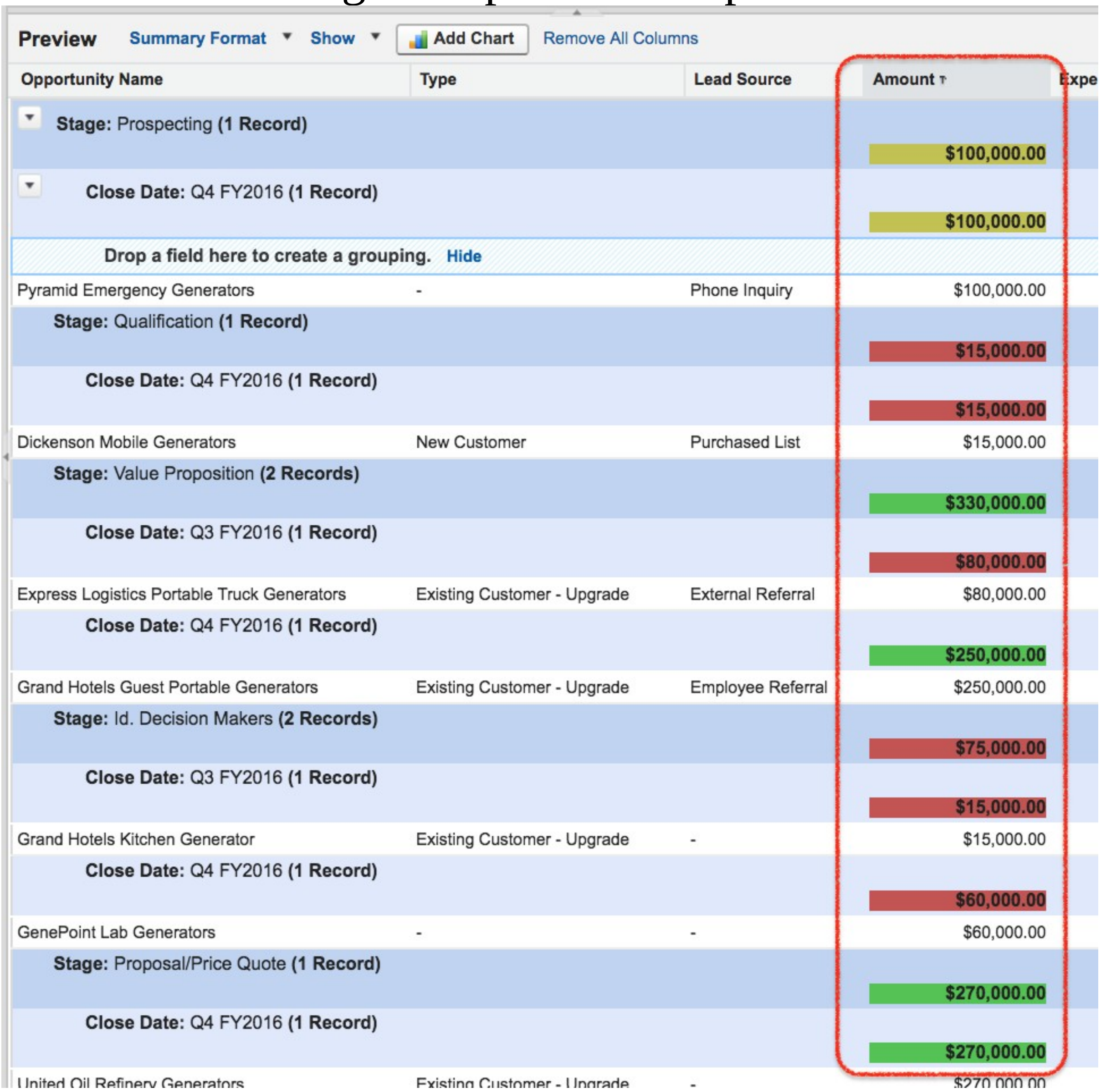
What is Conditional Highlighting in Salesforce reports?

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

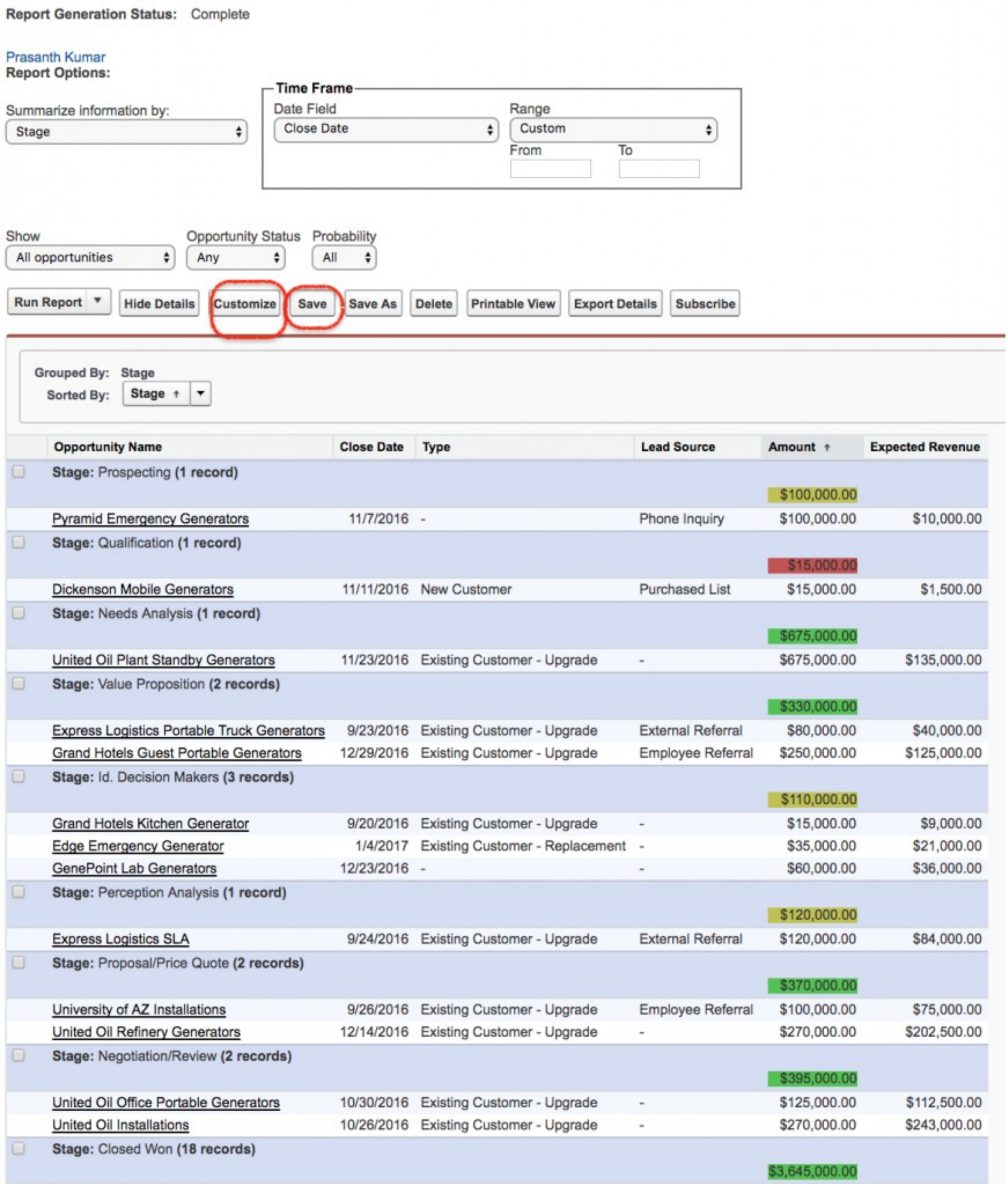
different ranges of values in reports using conditional highlighting.
Click on show drop down and select Conditional Highlighting.

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.



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.

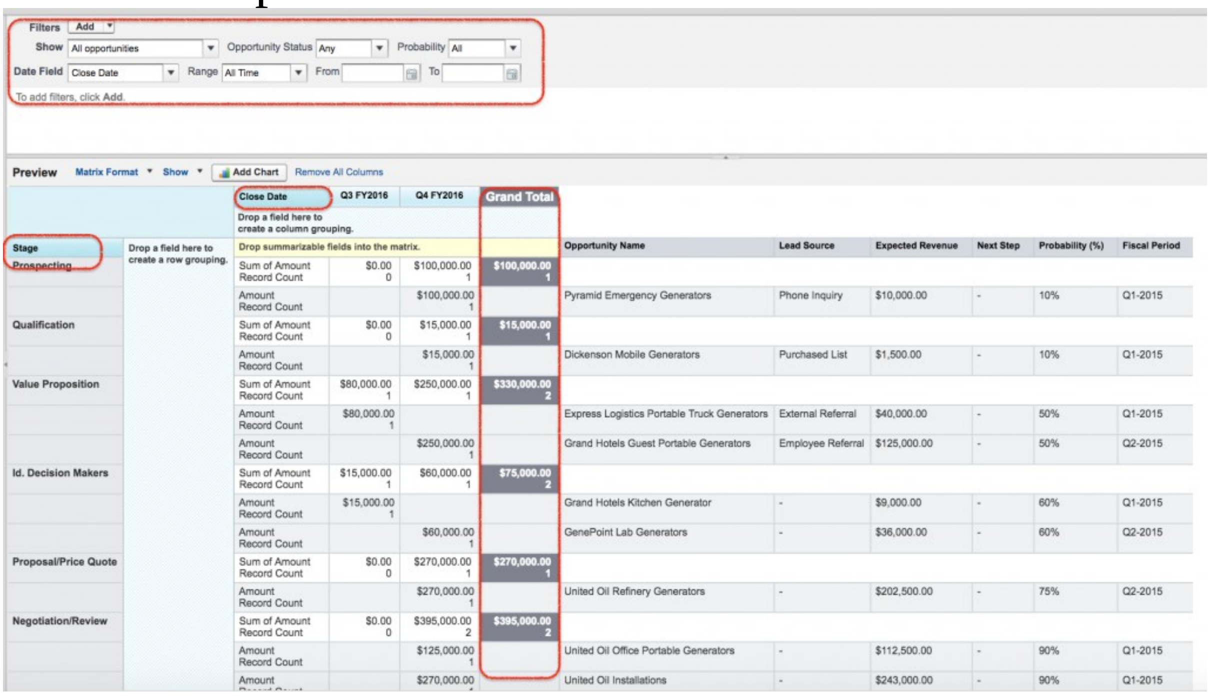
These are used to summarize large amounts of data.

How to create matrix report in Saleforce.com?

In Summary report we can not group data by rows and columns so we go for matrix reports. Login Salesforce and navigate toSetup | 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.



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.

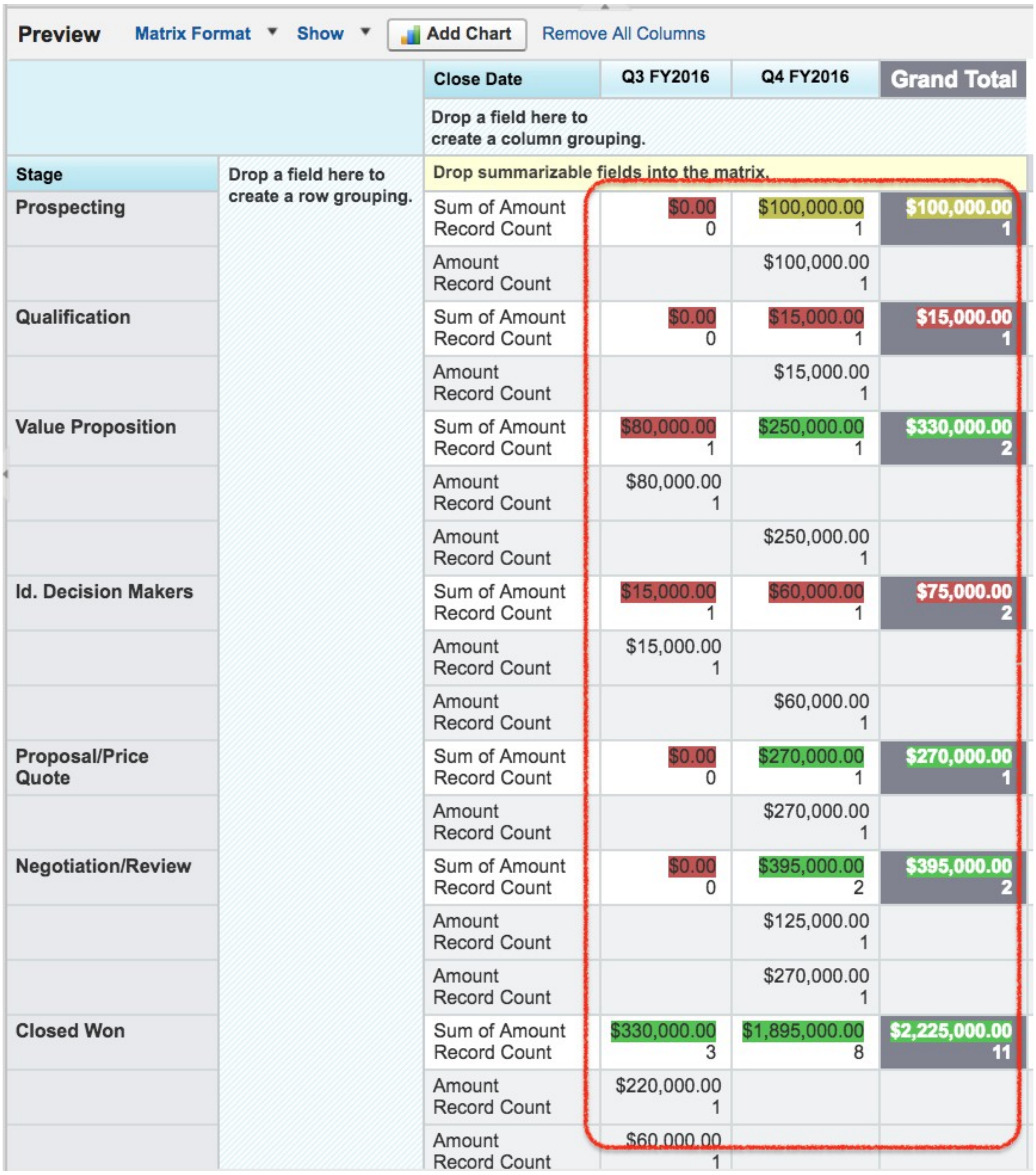
Conditional highlighting in Matrix reports.

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.



Stage	Close Date	Q3 FY2016	Q4 FY2016	Grand Total
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.

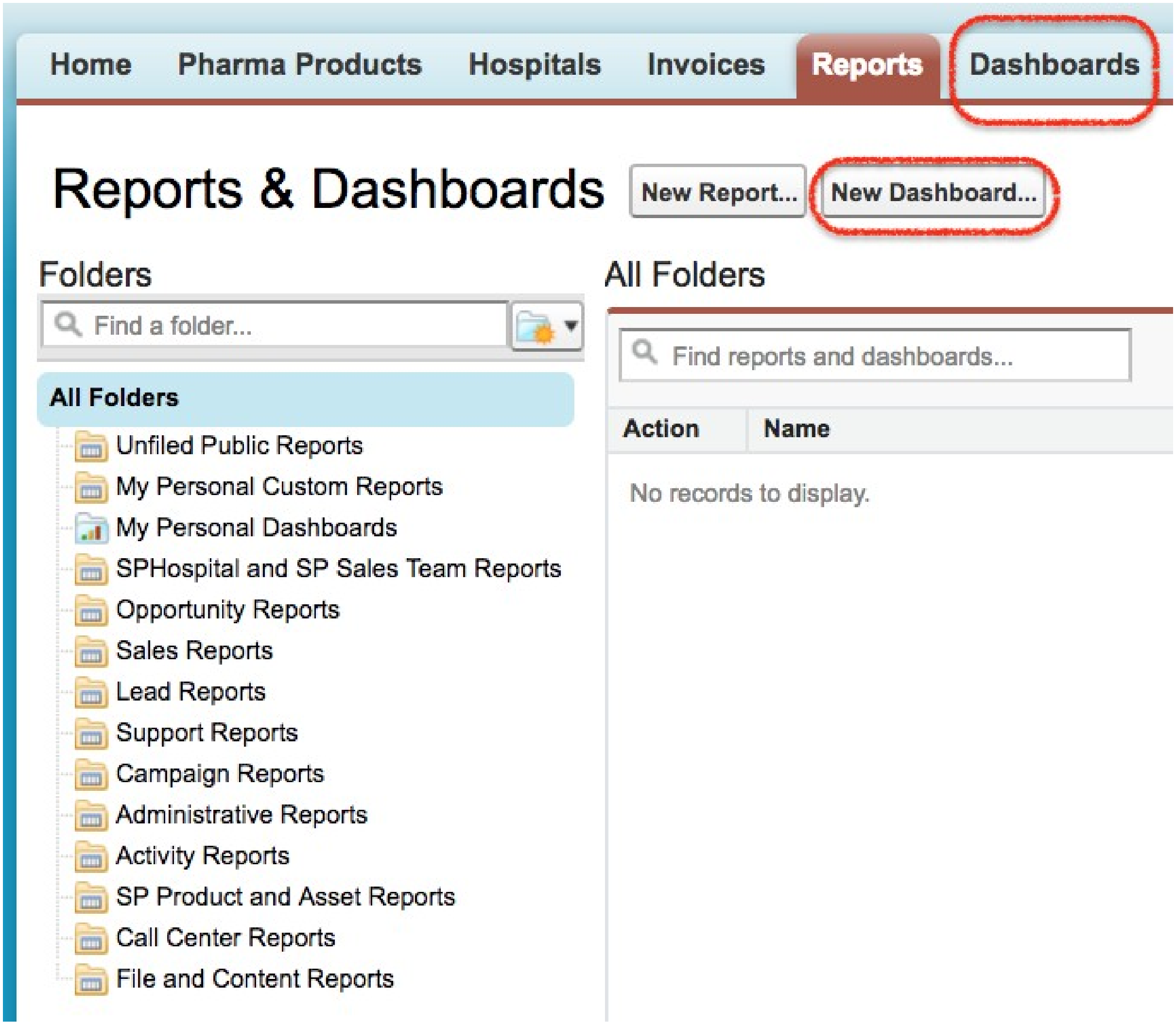
Dashboards won't refresh automatically unless it is set to do.

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.

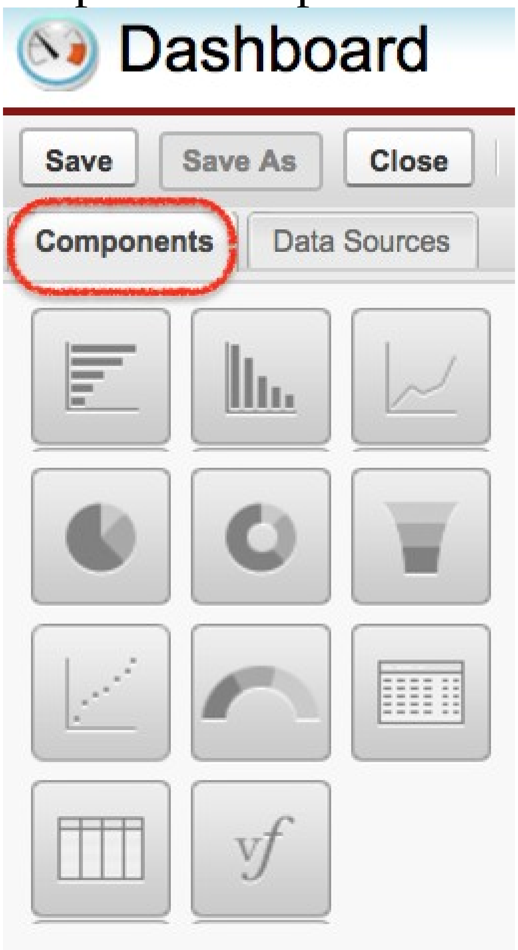
- Navigate toDashboard tabs | Click on New Dashboard.



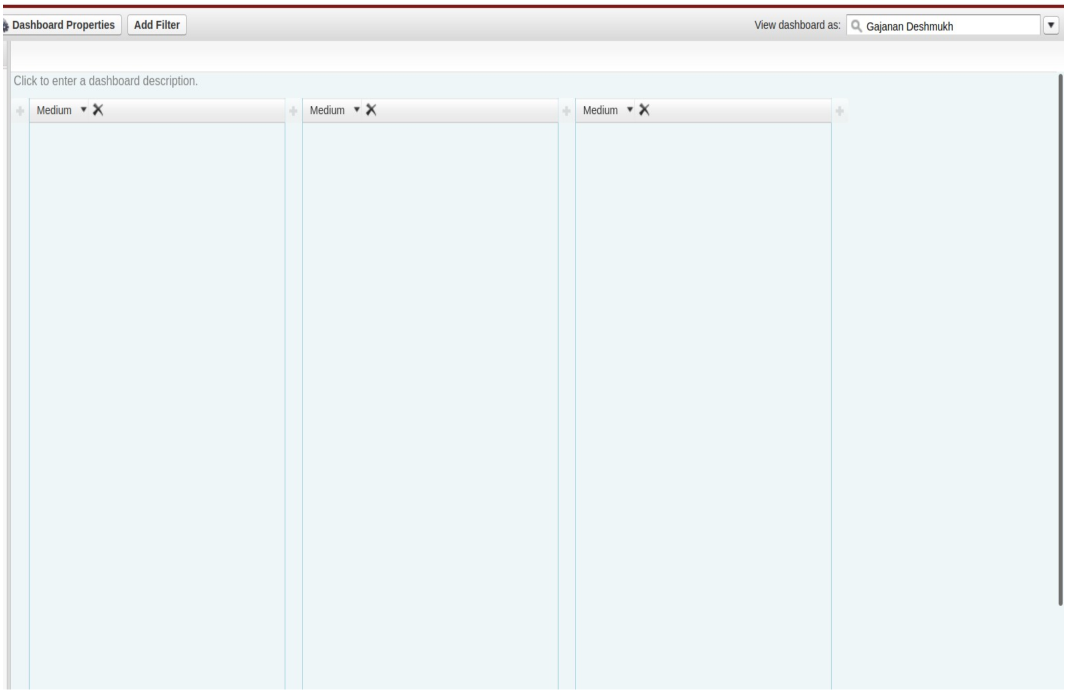
When we click on New Dashboard button a new page will be opened where user can select Components and Data Sources.
Data Source is the the pre-prepared source reports containing the data you wish to display in Salesforce dashboard. These source reports are stored in folders that your intended dashboard viewers have access or they will not be unable to view the information.

Now go toData 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.

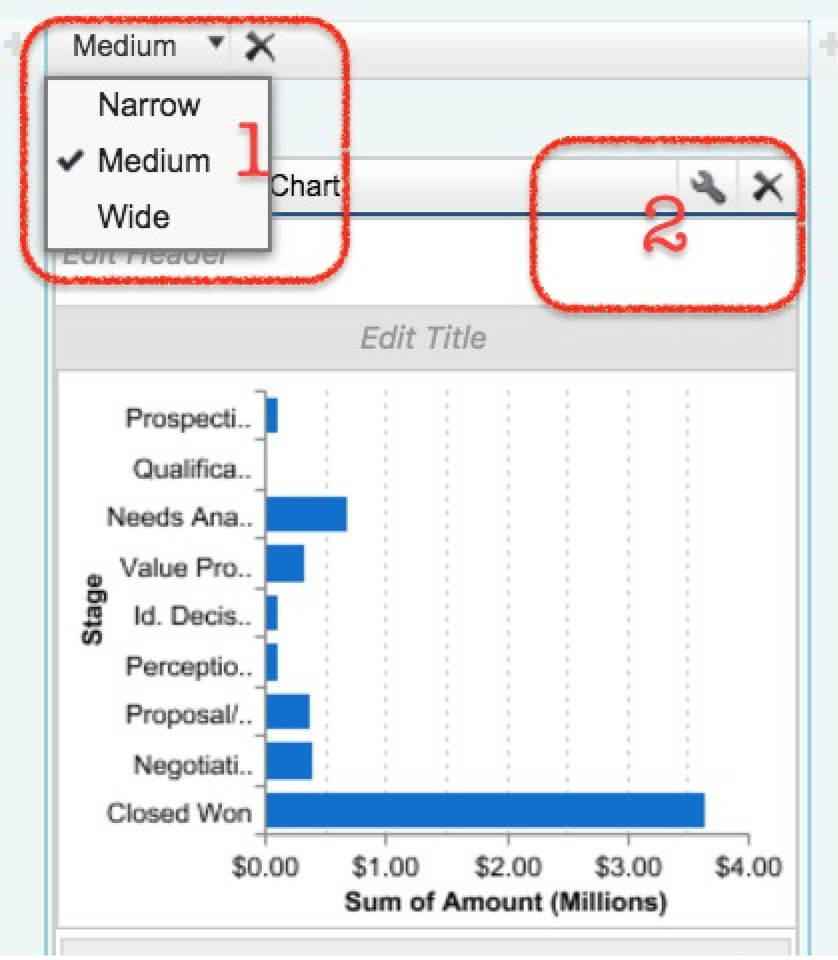


The most important concept that to be remembered while creating Salesforce dashboard is to understand how do we customize the dashboard to show the information that we need.

Customizing Salesforce Dashboard.

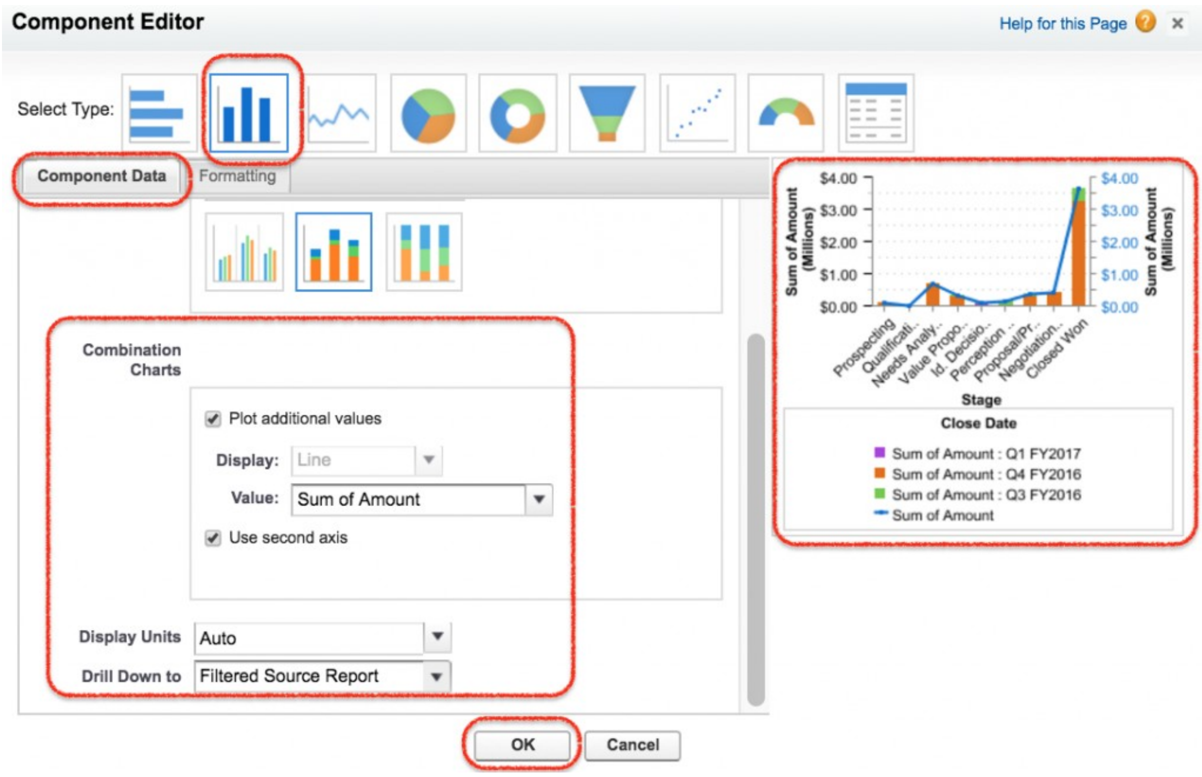
We have options called Narrow, medium and wide. We can select any option to get better view of the dashboard.

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.

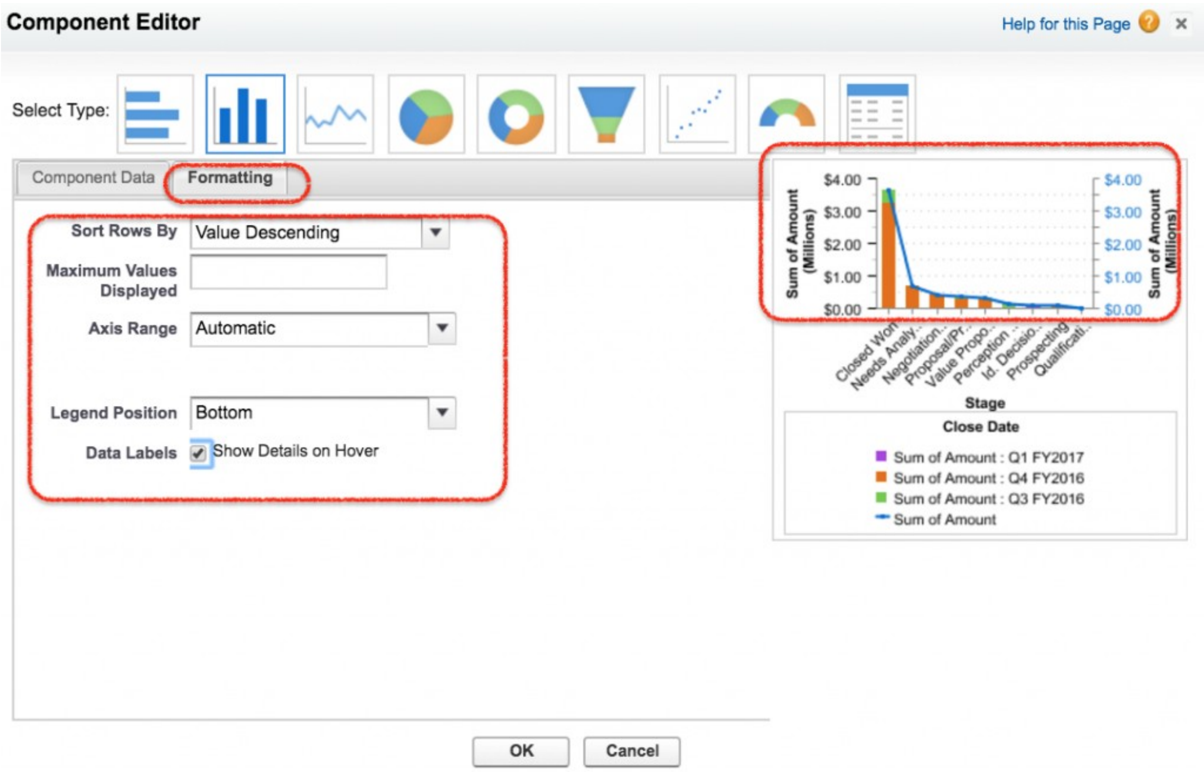
Component data : Here we define X-Axis, Y-axis, grouping by any field, combination chart, display units and drill down data.



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.



Enter Description and footer to your Salesforce Dashboard.

Now finally click on Save button.

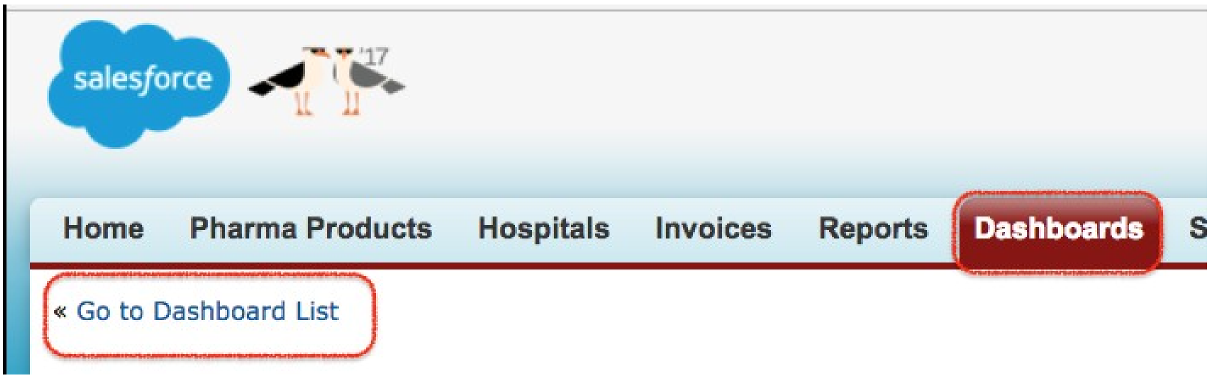
What Dynamic Dashboard in Salesforce?

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.

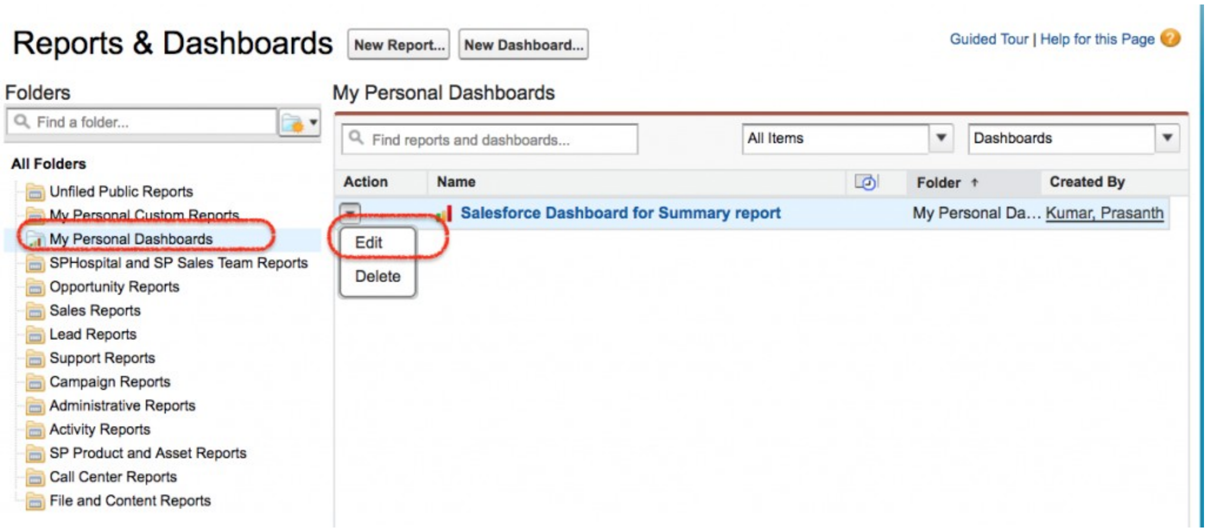
Creating Dynamic Dashboard in Salesforce?

Depending up on theSalesforce 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 Salesfore.com and navigate toDashboard | dashboards lists.



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

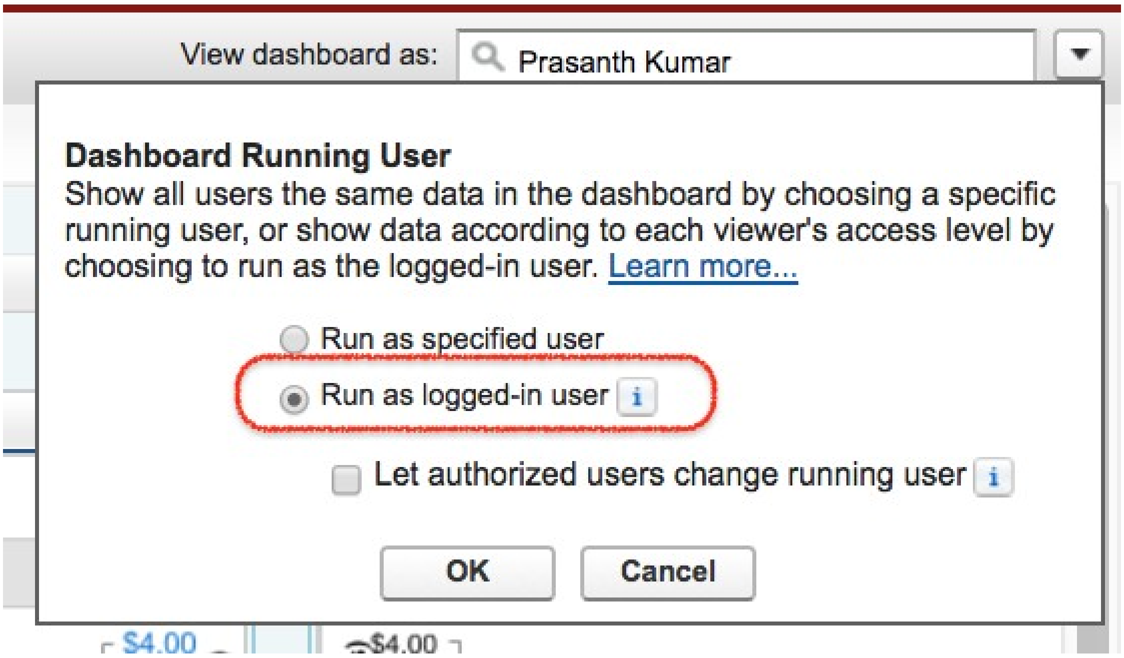


Now click on the button next to the View dashboard as field and select Run as Logged-in user option as shown below.

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.

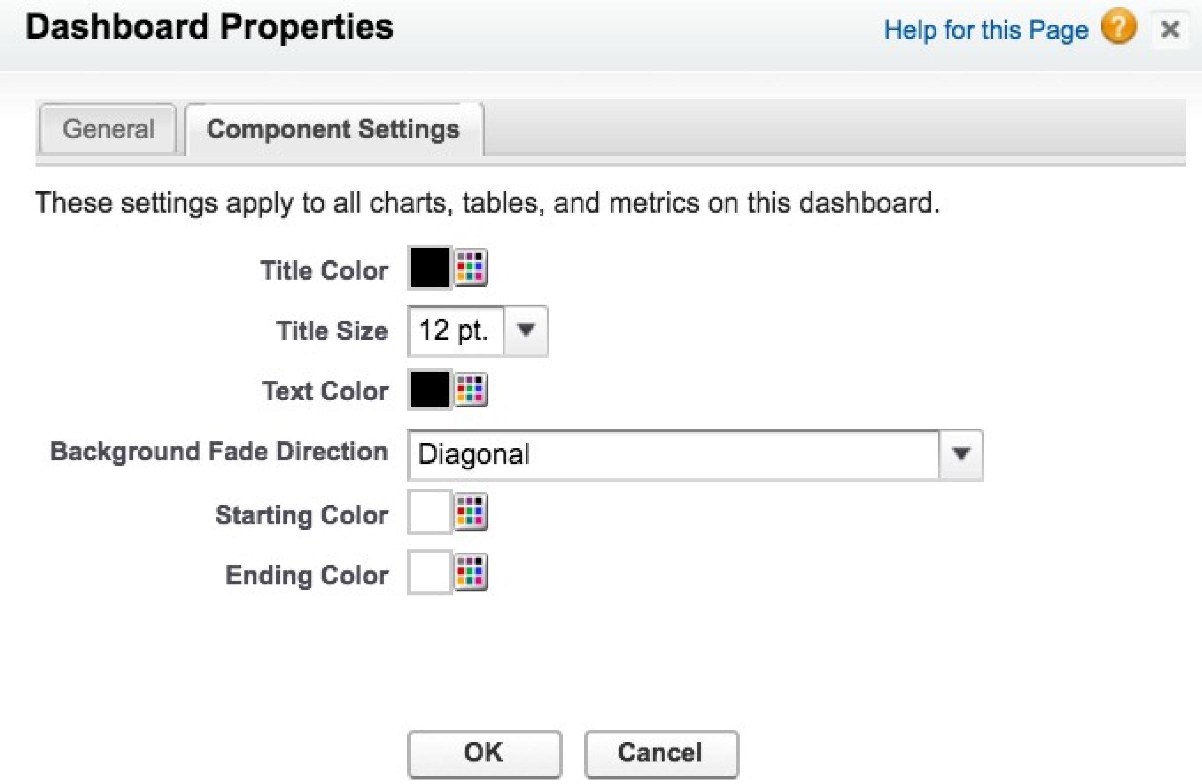
In the View dashboard as field, enter a running user.



Save the dashboard.

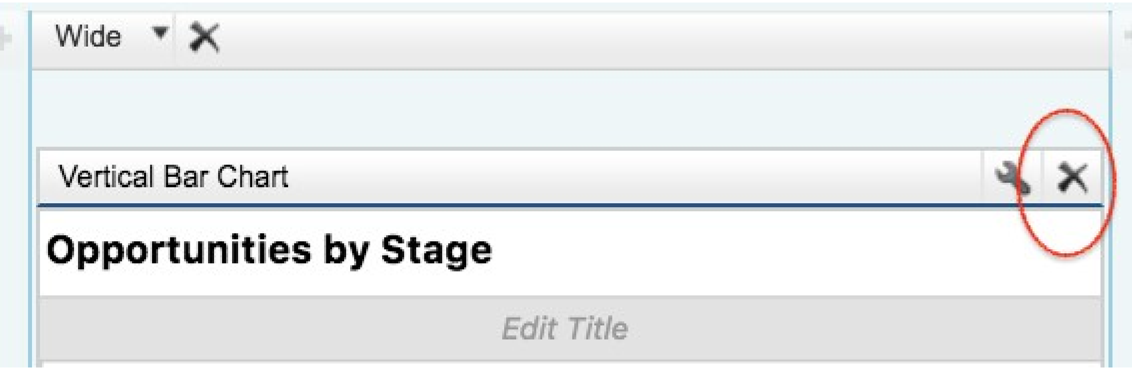
Customizing Salesforce dashboard is very simple. We can edit, delete, Print and can set dashboard properties. Dashboard title colour, Size, background fade and text color can be done at component settings.

Navigate toDashboard Properties | Component Settings.



Deleting and Printing Salesforce Dashboard.

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



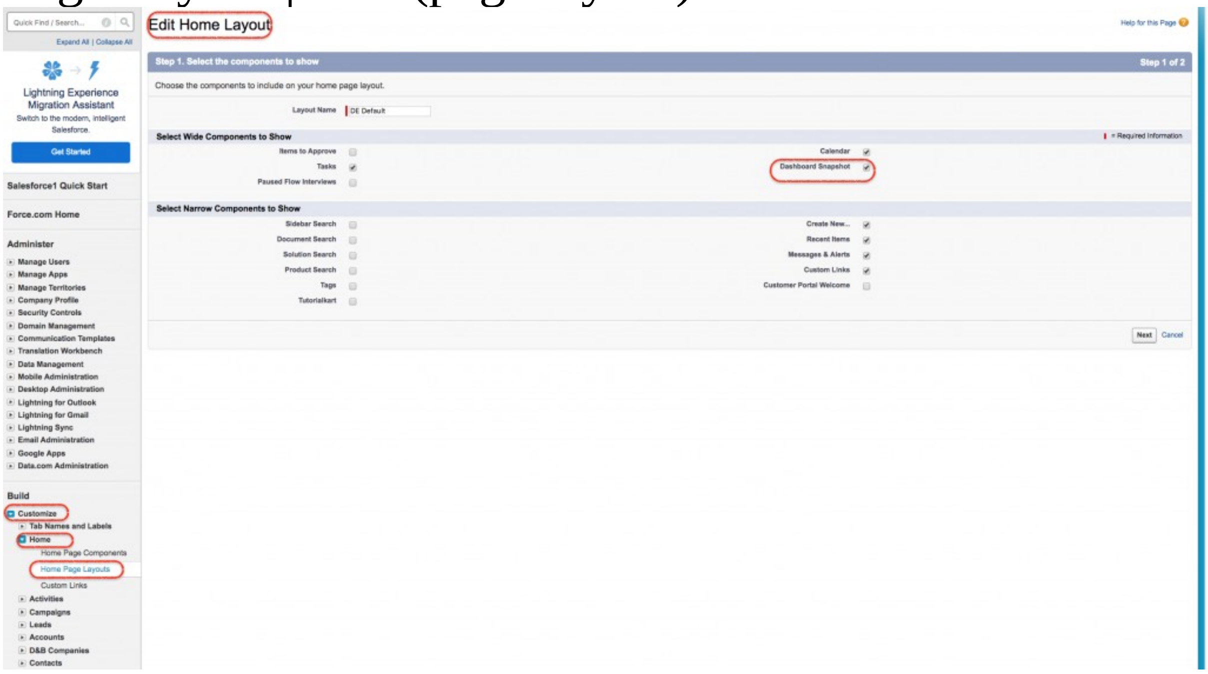
Click on X to delete your Salesforce dashboard.

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 toSetup | Build | Customize |Home | Home Page Layout | Edit (page layout).



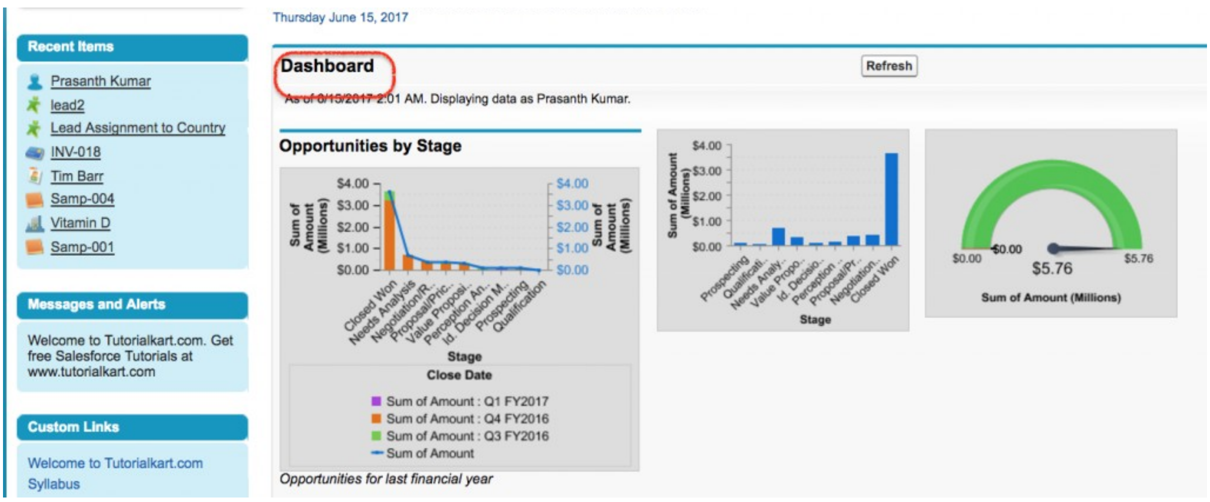
Check Dashboard Snapshot to add on Home Page Layout.

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.