

# Phase 9

## Reports & Dashboards

This document provides the step-by-step instructions to create Reports and Dashboards in Salesforce as part of Phase 9 implementation, including report types and dashboard types.

### 1. Reports

Salesforce offers different types of reports depending on the analysis needed.

#### Report Types

- Tabular Reports: Simple lists of data; ideal for exporting or quick views. Example: Student List, Attendance List.
- Summary Reports: Grouped data with subtotals; useful for summaries. Example: Class-wise Student Count, Attendance Percentage by Class.
- Matrix Reports: Data grouped by rows and columns; ideal for cross-tab analysis. Example: Attendance Matrix (Classes vs Months), Grades Matrix (Subjects vs Terms).
- Joined Reports: Combine multiple report types into one view; good for holistic performance. Example: Student + Attendance + Grades, Course Enrollment + Completion Rate.

#### Steps to Create Reports

- Go to the App Launcher (9 dots) and search for 'Reports'.
- Click on 'New Report'.
- Choose the appropriate report type (Tabular, Summary, Matrix, Joined) based on your data needs.
- Click 'Continue'.
- Add required filters (e.g., filter by 'Status = Active' for Students).
- Drag and drop fields into the report outline (such as Name, Program, Semester, Fee Paid).
- Group data if required (Summary/Matrix reports).
- Click 'Run' to preview the data.
- Save the report with a suitable name and folder (e.g., 'Student Reports').



Report: Enrollments with Course

## New Enrollments with Course Report

Total Records

6

	Enrollment: Enrollment Number ▾	Course: Course Name ▾
1	ENR-0107	Electronics
2	ENR-0106	Electronics
3	ENR-0105	Electronics
4	ENR-0104	Electronics
5	ENR-0101	Electronics
6	ENR-0108	Python

Reports						
Recent						
6 items						
<input type="text" value="Search recent reports..."/>						
REPORTS	Report Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subsc
Recent	New Enrollments with Course Report		Private Reports	Maktumsabgari Juha Fathima	9/25/2025, 3:26 PM	
Created by Me	New Faculties Report		Private Reports	Maktumsabgari Juha Fathima	9/25/2025, 3:29 PM	
Private Reports	New Students with Course Report		Private Reports	Maktumsabgari Juha Fathima	9/25/2025, 3:21 PM	
Public Reports	Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	9/25/2025, 8:18 AM	
All Reports	Exercise Completion Status by Section	Analyze an exercise's completion status based on program sections.	Enablement Dashboard Reports Summer '24	Automated Process	9/12/2025, 10:59 PM	
FOLDERS	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	9/12/2025, 10:59 PM	
All Folders						
Created by Me						

## 2. Dashboards

Dashboards allow visual representation of reports. Each dashboard can contain multiple components based on report charts.

### Dashboard Types

- Chart Component: Visual charts like bar, line, pie, or donut charts.
- Gauge Component: Shows a single metric in a gauge style, useful for targets.
- Metric Component: Displays a single number or KPI metric.
- Table Component: Displays tabular data from reports.
- Visualforce Component: Embeds Visualforce pages or custom content in dashboard.

### Steps to Create Dashboards

- Go to the App Launcher and search for 'Dashboards'.
- Click on 'New Dashboard'.
- Enter the Dashboard Name (e.g., Student & Fee Insights) and select a folder.
- Click 'Create'.
- Click '+ Component' to add a chart or table.
- Select the source report (e.g., 'Fee Payment by Semester').
- Choose the display type (bar chart, pie chart, line chart, gauge, metric, table, etc.).
- Adjust chart settings like labels, legends, and filters.
- Click 'Add' and repeat to add more components.
- Save the dashboard and click 'Done'.
- View the dashboard to monitor reports visually.

Search

×

Created By

Created On

Last Modified By

akturathim

Rename Folder

\* Folder Label

Codsphere reports

\* Folder Unique Name

Codsphere reports

Cancel

Save

CodeSphere Institute

Students

Courses

Faculties

Enrollments

Fee Payments

Chatter

Dashboards

Reports

Files

Student Overview

+ Widget

+ Filter

↺

↻

⚙

Save

Done

Faculty: Faculty Name

All

New Faculties Report

Faculty: Faculty Name ↑

Basha

Nida

Reshma

Riya

View Report (New Faculties Report)

New Enrollments with Course Report

Enrollment: Enrollment Number ↑	Course: Course Name
ENR-0101	Electronics
ENR-0104	Electronics
ENR-0105	Electronics
ENR-0106	Electronics
ENR-0107	Electronics
ENR-0108	Python

View Report (New Enrollments with Course Report)

New Students with Course Report

Student: Student Name ↑	Course: Course Name
Nida	Electronics
pallavi	Electronics
zaira	Electronics
Zuha Fathima	Electronics
Zuhaib	Python

View Report (New Students with Course Report)

