

## PHASE 9

### REPORTS AND DASHBOARDS:

#### **What is a Report in Salesforce?**

A **Report** is a list of records that meet certain criteria, displayed in rows and columns. It helps you **analyze data, track performance, and make decisions**.

For example:

- A report on **Orders** could show: *Order Number, Account, Order Amount, Status*.
- A report on **Customers** could show: *Customer Name, Total Purchases, Loyalty Points*.

#### **Key Elements of a Report**

1. **Report Type**
  - Defines *which object(s)* you're reporting on (e.g., Orders, Accounts, Contacts, or Orders with Order Items).
  - Determines what fields are available to add in your report.
2. **Columns**
  - The fields you choose to display (e.g., Order Number, Account Name, Order Start Date).
3. **Filters**
  - Narrow down the data (e.g., *Status = Completed, Created Date = Last 30 Days*).
4. **Grouping**
  - Organize records by field values (e.g., group Orders by *Status* or *Account*).
5. **Summaries**
  - Totals, averages, minimum, maximum values on numeric fields (e.g., total Order Amount).
6. **Report Formats** (in Lightning)
  - **Tabular** → Simple list (like an Excel table).
  - **Summary** → Grouped rows, with subtotals.
  - **Matrix** → Group rows *and* columns (like a pivot table).
  - **Joined** → Multiple report blocks combined for comparison.

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** The top navigation bar includes tabs for "Recently Viewed", "Orders", "Home | Salesforce", "Order DineIn Page - Lightning", "Report Builder | Salesforce", and "Created by Me | Reports".
- Page Title:** The page title is "Created by Me | Reports".
- Search Bar:** A search bar at the top right contains the placeholder "Search...".
- Top Navigation:** The main navigation bar includes links for "Navss resto", "Orders", "Bookings", "Dashboards", "Reports" (selected), "Loyalty Accounts", "Order Items", and "More".
- Left Sidebar:** A sidebar on the left lists report categories: "RECENT", "Created by Me" (selected), "Private Reports", "Public Reports", and "All Reports". It also lists "FOLDERS" and "All Folders".
- Report List:** The main content area displays a table of reports. The columns are "Report Name", "Description", "Folder", "Created By", "Created On", and "Subscribed".

Report Name	Description	Folder	Created By	Created On	Subscribed
New Bookings	Private Reports	PAIPETI PALLAVI	PAIPETI PALLAVI	9/26/2025, 10:24 AM	<span>▼</span>
New Orders Report	Private Reports	PAIPETI PALLAVI	PAIPETI PALLAVI	9/26/2025, 10:18 AM	<span>▼</span>
- Bottom Navigation:** The bottom navigation bar includes icons for Home, Search, and various system functions like File, Help, and User.
- System Status:** The bottom left shows system status: 6 notifications, 26°C, Mostly cloudy, and a battery level of 11:09 26-09-2025.

## Dashboards

- Purpose:

This dashboard provides insights into how enablement activities (such as training, guidance, or support programs) drive business outcomes. It is designed to be the central place for monitoring enablement analytics.

- **Features:**

- Tracks business impact of enablement strategies.
  - Shows KPIs aligned to business performance.
  - Helps leadership and managers evaluate enablement ROI.

- **Notes:** This dashboard should not be deleted. If changes are required, it must be duplicated before editing.

Salesforce Lightning interface showing the All Dashboards page.

Header:

- Recently Viewed | Orders | Sales
- Home | Salesforce
- Order DineIn Page - Lightning
- Report Builder | Salesforce
- All Dashboards | Dashboards

Search bar: Search...

User info: \*JohnDoe|Customer

Toolbar:

- Dashboard icon
- Search icon
- Add icon
- Help icon
- Profile icon

Page Title: orgfarm-f65ecccdf-dev-ed.develop.lightning.force.com/lightning/o/

Page URL: /o/Dashboard/home?queryScope=everything

Page Content:

Dashboards

### All Dashboards

5 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Spring '24	Automated Process	9/18/2025, 12:17 PM	
Created by Me	Enablement Dashboard	View data on how Enablement helps drive your business outcomes. This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.	Enablement Dashboard Summer '24	Automated Process	9/18/2025, 12:17 PM	
Private Dashboards	Kitchen	Items related to the kitchen	Enablement Dashboard Summer '24	PAIPETI PALLAVI	9/26/2025, 10:30 AM	
All Dashboards	Manager	Manager dashboard related to the restaurant menu and the cost	Private Dashboards	PAIPETI PALLAVI	9/26/2025, 10:28 AM	
	Pallavi		Private Dashboards	PAIPETI PALLAVI	9/26/2025, 10:26 AM	

Left sidebar:

- DASHBOARDS
  - Recent
  - Created by Me
  - Private Dashboards
- FOLDERS
  - All Folders
  - Created by Me
  - Shared with Me
- FAVORITES
  - All Favorites

Bottom status bar:

- 26°C Mostly cloudy
- Search bar
- Icons for various apps (File Explorer, Task View, Control Panel, Microsoft Edge, File History, Task Scheduler, HP Assistant, File Explorer, Microsoft Word, Microsoft Excel, Microsoft Powerpoint, Microsoft OneNote, Microsoft Word, Microsoft Excel, Microsoft Powerpoint, Microsoft OneNote)
- Network and battery status
- 11:01 PM
- ENG IN
- 26-09-2025