1.

Q : What are Data Analysis Tools available in Salesforce?

A :

- Report
- Dashboard

2.

Q : What is Report?

A :

- Report is a list of records related to objects that meet the criteria defined.
- One can filter, group and do maths on reports.
- One can display reports graphically through charts.
- Every report is stored in a folder.
- Report folders determines how one can access reports to View, Edit, or Manage.
- Report folders can be public, hidden, or shared.

3.

Q : What is Report Type?

A :

- A report type is like a template for reports.
- Report type determines which fields and records are available for use, when one is creating a report.
- This is based on relationships between a primary object and its related objects.
- For example, with Accounts with Contact report type, Account is primary object and Contact as related object.
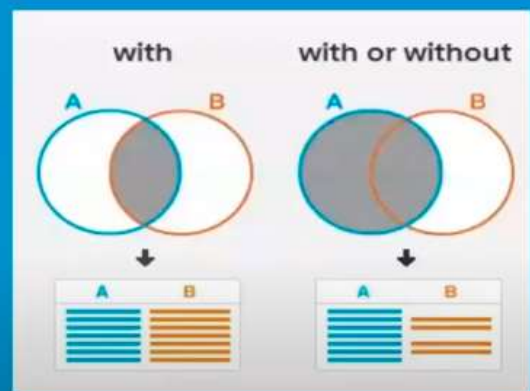- Reports display those record that meet the criteria defined in report types.

4.

Q : What is Report Type?

A :

- Primary object with related object.
- Primary object with or without related object.

5.

Q : Types of Reports?

A :
- Tabular Report
  - Make a List
- Summary Report
  - Group by Rows
- Matrix Report
  - Group by Rows & Columns
- Joined Report
  - Have more than one reports together

6.

Q : What is Tabular Report?

A :
- Tabular report is the simplest report format.
- Rows display records and columns display fields.
- Filters can be applied.
- Sorting can be applied.
- Chart is not supported in this type of reports.

7.

Q : What is Summary Report?

A :
- This report allows the user to group records based on rows.
- We can summarize the report based on particular field.
- This report supports chart.
- Filters and Sorting can be applied.
- It displays subtotal as well for numeric fields.

8.

Q : What is Matrix Report?

A :
- This report summarize the records based on rows and columns.
- It basically creates a grid and show number of records based of grouping of rows and columns.
- This report also support charts.

9.

Q : What is Joined Report?

A :
- In this type, User can create multiple blocks of reports having different types of reports.
- Each block is defined as a sub report and can have different report type.
- Each block has its own fields, filter criteria, charts etc.

10.

Q : Filters in reports?

A :
- Standard Filter
  - Show Me & Created Date
- Field Filter
  - Specific to fields
- Filter Logic
  - Boolean Condition to control Field Filters
- Cross Filter
  - Filter a report by child object using With or Without conditions

11.

Q : Charts can be added in which type of Report?

A :
- Summary Report
- Matrix Report
- Joined Report

12.

Q : Types of Charts available in Report?

A :
- Bar
- Column
- Stacked Bar
- Stacked Column
- Line
- Donut
- Funnel
- Scatter Plot

13.

Q : What is Bucket Field in Report?

A :
- Bucket Field is created in report itself.
- This field is used to group values of particular field available on the object.
- It supports fields of type Picklist, Number & Text.

14.

15.

16.

17.

Q : Can we place a report on Lightning Page?

A :
- Yes, We can place report on below lightning pages:
  - Home Page
  - App Page
  - Record Page
- Report should not be in private folder.

18.

Q : What is Dashboard?

A :
- A dashboard is a visual display of key metrics and trends for records in your org.
- Source of dashboard is Reports.
- You can place one report in multiple dashboards components on a single dashboard.
- Having multiple reports on a single dashboard page makes it a powerful visual display tool.

19.

Q : Can we place a Dashboard on Lightning Page?

A :
- Yes, We can place dashboard on below lightning pages:
  - Home Page
  - App Page
  - Record Page
- Dashboard should not be in private folder.

20.

Q : Can we apply filters in Dashboard?

A :
- Yes, We can apply.

21.

Q : About Dashboard Folder:

A :
- Dashboard folder controls who has access to its content.
- If one has access to folder then only one can access its dashboards.
- However, to view the dashboard components, one need access to underlying reports as well.

22.

Q : Can we share a dashboard with User or Group?

A :
- Yes, We can share dashboard folder.
- We cannot share individual dashboard.

23.

Q : Access Levels while sharing Dashboard Folder?

A :
- View
- Edit
- Manage

24.

Q : Important About Dashboard?

A :
- Eash Dashboard has a running user.
- Running user's security settings determine which data to display in dashboard.
- If the running user is a specific user, then all dashboard viewers sees data based the security setting of that user, regardless of their own security settings.
- **Dynamic Dashboards** are those for which running user is always logged in user. Here, each user views the dashboard as per their own security settings.