Salesforce Lightning

Lesson 03: Reports and Dashboards

Capgemini

Lesson Objectives

Understand:

- Reports and Dashboard in Lightning Experience
- Dashboard with feature rich editor
- Report Builder
- Related objects
- Filter options available in reports
- Format Reports
- Lightning Dashboards

Reports and Dashboards in Lightning Experience

- In Lightning Experience makes it more interactive, easier to navigate, and easier to edit

- Get more information from interactive charts without needing to drill into reports

- Create dashboards with more than three columns and column-spanning components using the Lightning dashboard editor

- Without launching the report builder, you can edit report filters, show or hide a chart, totals, and details

- Find, manage, and create reports and dashboards more easily via redesigned home pages

- Work with your reports and dashboards from Salesforce Classic in Lightning Experience

Dashboards with feature rich editor

- The Lightning table is a new dashboard component that's only available in Lightning Experience

- It offers:

Up to 10 columns and 200 rows!

Columns come from source reports' report type

Show Chatter photos and conditional highlighting.

Lightning tables are dashboard filter compatible.

Customize dashboard color palette and theme

Report Builder

Report type:

- Helps you pick the reports and fields you will be able to see in your reports
- Has primary object relationship and field layout
- object relationship determines which records the report type includes
- If you specify only a primary object, your report type includes only records for that object
- If you also specify a related object, then your report type includes primary objects with related objects

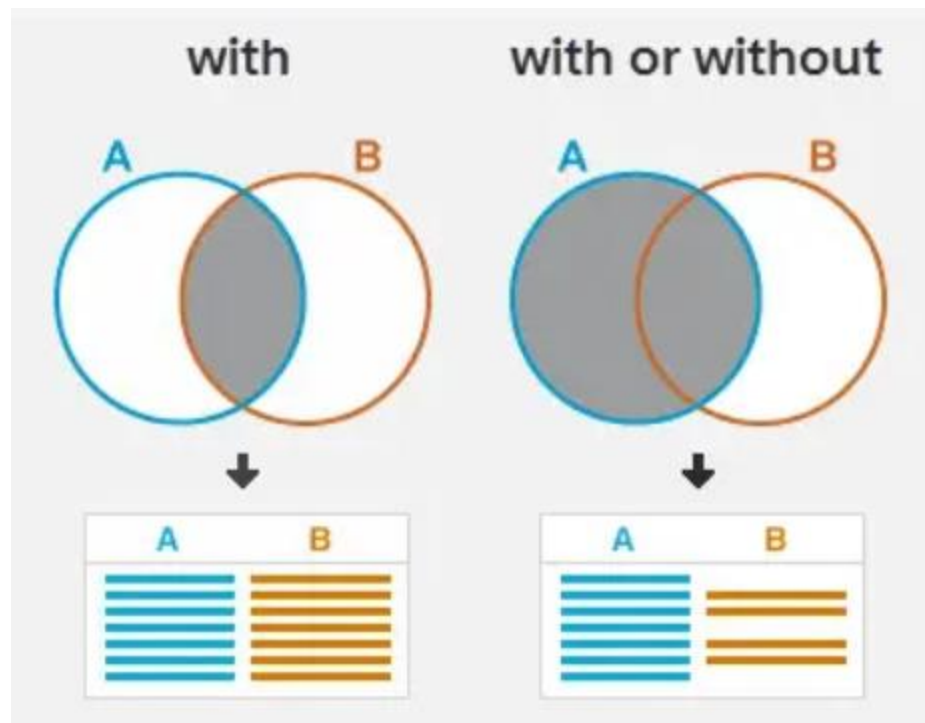**Primary object with related object:**

- Records returned are only those where the primary object has at least one related object record

Primary object with or without related object:

- Records returned are those where the primary object may or may not have a related object record

Related Objects

- You can have up to four related objects, can have the "with" or "with or without" distinction

Filter options available in Reports

1. Standard Filters

2. Field Filters

3. Filter Logic

4. Cross Filter
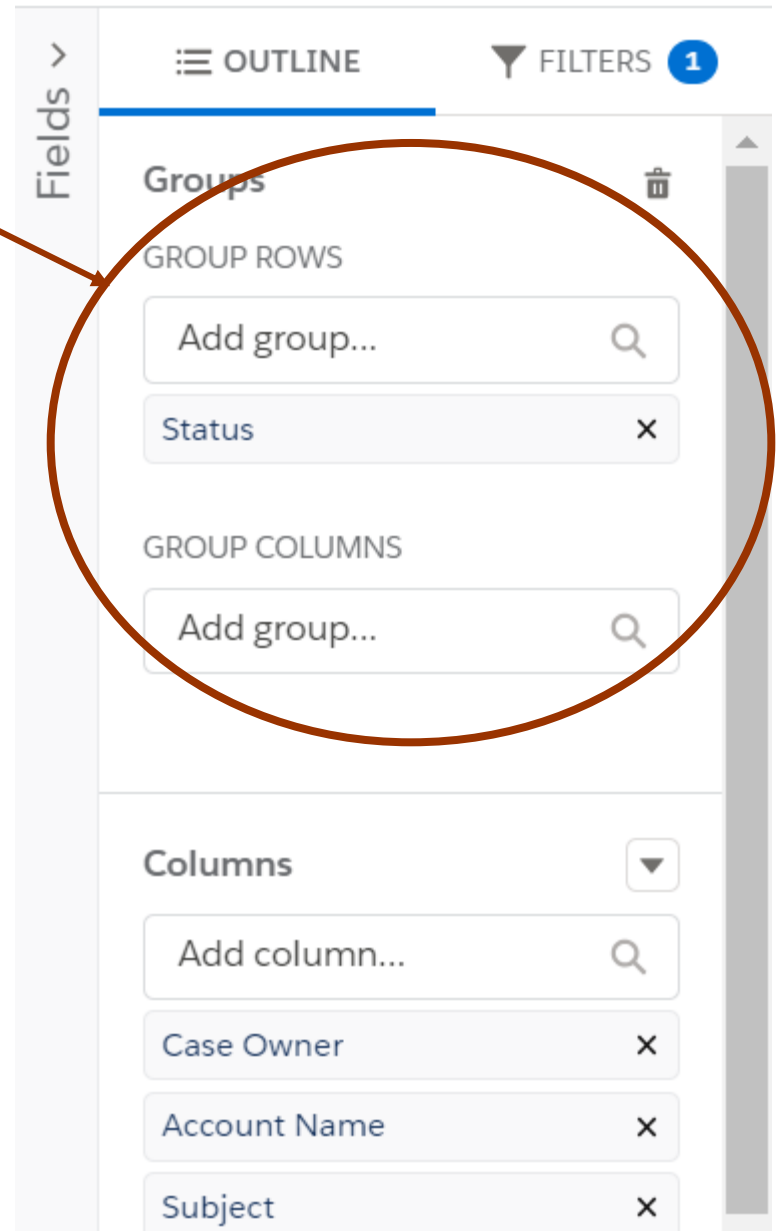
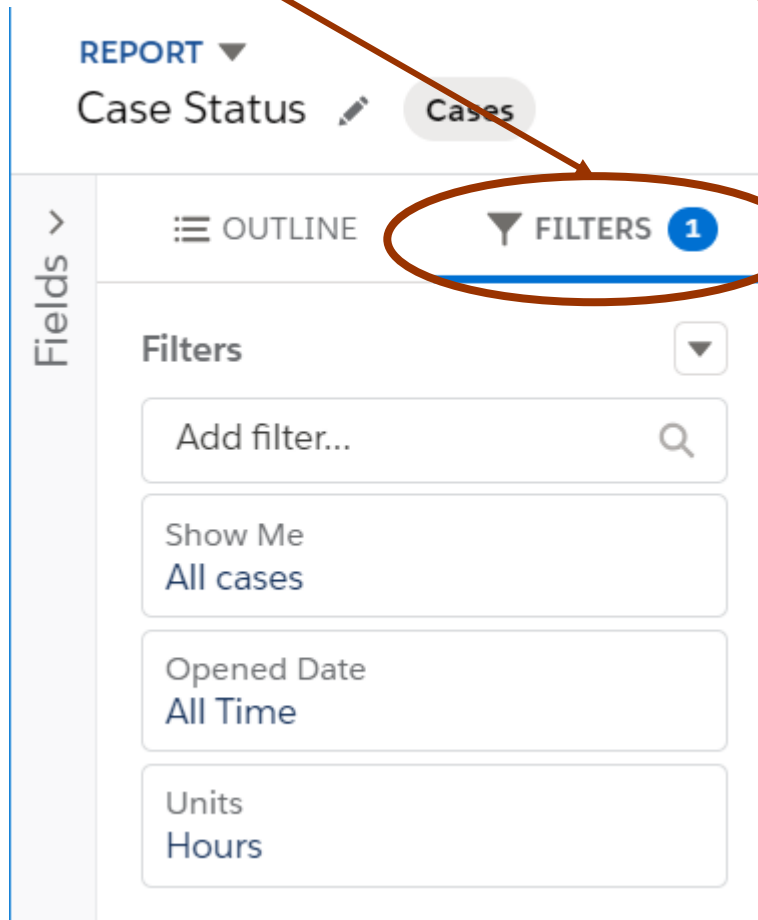5. Row Limit

Format Reports

- Tabular
    - List, spreadsheet
    - Supports Dashboard

- Summary
    - For grouping and summary
    - Supports dashboards and charts
    - Formula can be used

- Matrix
    - Group and summary can be done by row and column
    - Supports dashboards and charts
    - Formula can be used

Creating Reports

For Summary and Matrix Reports

Add Filters

≡ OUTLINE   ▼ FILTERS ①

Fields ›

Groups   🗑

GROUP ROWS

Add group...   🔍

Status   ✕

GROUP COLUMNS

Add group...   🔍

REPORT ▼
Case Status ✏   Cases

Fields ›

≡ OUTLINE   ▼ FILTERS ①

Filters   ▼

Add filter...   🔍

Show Me
All cases

Opened Date
All Time

Units
Hours

Columns   ▼

Add column...   🔍

Case Owner   ✕

Account Name   ✕

Subject   ✕

Lightning Dashboards

- Salesforce dashboards present multiple reports side-by-side Salesforce dashboards present multiple reports side-by-side layout

- Dashboard components are chart types, tables, metrics, and gauges

- drag-and-drop dashboard builder is an intuitive interface for building dashboards from source reports you've created in Salesforce.

Demo

Creating Reports

Creating Dashboards

Summary

Created lightning reports

Add filters to reports

Create reports with different formats

Create lightning dashboards

Summary

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