

Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

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Task 1: Create a Tabular Report

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Search: Search...

Navigation: Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Report: Opportunities
SIMPLY SOCIAL CLOSED AND WON OPPORTUNITY

Total Records: 19

	Opportunity Name	Stage	Expected Revenue	Type
1	Edge SLA	Closed Won	60.000,00 €	Existing Customer - Upgrade
2	Grand Hotels SLA	Closed Won	90.000,00 €	Existing Customer - Upgrade
3	Express Logistics Standby Generator	Closed Won	220.000,00 €	New Customer
4	University of AZ Portable Generators	Closed Won	50.000,00 €	New Customer
5	University of AZ SLA	Closed Won	90.000,00 €	Existing Customer - Upgrade
6	United Oil Emergency Generators	Closed Won	440.000,00 €	Existing Customer - Upgrade
7	Edge Installation	Closed Won	50.000,00 €	Existing Customer - Upgrade
8	United Oil Installations	Closed Won	270.000,00 €	Existing Customer - Upgrade
9	GenePoint Standby Generator	Closed Won	85.000,00 €	New Customer
10	Burlington Textiles Weaving Plant Generator	Closed Won	235.000,00 €	New Customer
11	United Oil Installations	Closed Won	235.000,00 €	Existing Customer - Upgrade
12	United Oil Refinery Generators	Closed Won	915.000,00 €	New Customer
13	Grand Hotels Emergency Generators	Closed Won	210.000,00 €	New Customer
14	Grand Hotels Generator Installations	Closed Won	350.000,00 €	Existing Customer - Upgrade
15	United Oil SLA	Closed Won	120.000,00 €	Existing Customer - Upgrade

To Do List

Task 1: Create a Tabular Report

On-Screen Keyboard

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Report: Opportunities
SIMPLY SOCIAL CLOSED AND WON OPPORTUNITY

Total Records: 19

Enable Field Editing Add Chart Edit

	Opportunity Name	Stage	Expected Revenue	Type
1	Edge SLA	Closed Won	60.000,00 €	Existing Customer - Upgrade
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6	United Oil Emergency Generators	Closed Won	440.000,00 €	Existing Customer - Upgrade
7	Edge Installation	Closed Won	50.000,00 €	Existing Customer - Upgrade
8	United Oil Installations	Closed Won	270.000,00 €	Existing Customer - Upgrade
9	GenePoint Standby Generator	Closed Won	85.000,00 €	New Customer
10	Burlington Textiles Weaving Plant Generator	Closed Won	235.000,00 €	New Customer
11	United Oil Installations	Closed Won	235.000,00 €	Existing Customer - Upgrade
12	United Oil Refinery Generators	Closed Won	915.000,00 €	New Customer
13	Grand Hotels Emergency Generators	Closed Won	210.000,00 €	New Customer
14	Grand Hotels Generator Installations	Closed Won	350.000,00 €	Existing Customer - Upgrade
15	United Oil SLA	Closed Won	120.000,00 €	Existing Customer - Upgrade

To Do List

Task 2: Create a Summary Report



On the following slide, insert a screenshot of the summary report you just created and ran.

Task 2: Create a Summary Report

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Search bar: Search...

Navigation menu: Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Report: Leads
SIMPLY SOCIAL WORKING CONTACTED LEADS

Buttons: Enable Field Editing, Add Chart, Edit

Lead Source	First Name	Last Name	Title	Company / Account	Lead Status
Web (4)	Tom	James	SVP, Production	Delphi Chemicals	Working - Contacted
	Norm	May	VP, Facilities	Greenwich Media	Working - Contacted
	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	Working - Contacted
	Brenda	Mcclure	CFO	Cadinal Inc.	Working - Contacted
Subtotal					
Phone Inquiry (1)	Violet	Macleod	VP, Finance	Emerson Transport	Working - Contacted
Subtotal					
Partner Referral (3)	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	Working - Contacted
	Kristen	Akin	Director, Warehouse Mgmt	Aethna Home Products	Working - Contacted
	Patricia	Feager	CEO	International Shipping Co.	Working - Contacted
Subtotal					
Purchased List (4)	Kathy	Snyder	Regional General Manager	TNR Corp.	Working - Contacted
	David	Monaco	CFO	Blues Entertainment Corp.	Working - Contacted
	Sandra	Eberhard	VP, Production	Highland Manufacturing Ltd.	Working - Contacted
	Betty	Bair	VP, Administration	American Banking Corp.	Working - Contacted
Subtotal					

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

To Do List

Task 3: Create a Matrix Report



On the following slide, insert a screenshot of the matrix report you just created and ran.

Task 3: Create a Matrix Report



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Search bar: Search...

Navigation menu: Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More



Report: Opportunities

SIMPLY SOCIAL OPPORTUNITIES PIPELINE

Enable Field Editing



Add Chart



Edit

Total Records: 10
Total Amount: 1.325.000,00 €
Average Amount: 132.500,00 €

Type	Stage	Value Proposition	Id. Decision Makers	Perception Analysis	Proposal/Price Quote	Negotiation/Review	Total
<input type="checkbox"/> -	Sum of Amount Average Amount Record Count	0,00 € 0,00 € 0	60.000,00 € 60.000,00 € 1	0,00 € 0,00 € 0	0,00 € 0,00 € 0	0,00 € 0,00 € 0	60.000,00 € 60.000,00 € 1
<input type="checkbox"/> Existing Customer - Upgrade	Sum of Amount Average Amount Record Count	330.000,00 € 165.000,00 € 2	15.000,00 € 15.000,00 € 1	120.000,00 € 120.000,00 € 1	370.000,00 € 185.000,00 € 2	395.000,00 € 197.500,00 € 2	1.230.000,00 € 153.750,00 € 8
<input type="checkbox"/> Existing Customer - Replacement	Sum of Amount Average Amount Record Count	0,00 € 0,00 € 0	35.000,00 € 35.000,00 € 1	0,00 € 0,00 € 0	0,00 € 0,00 € 0	0,00 € 0,00 € 0	35.000,00 € 35.000,00 € 1
Total	Sum of Amount Average Amount Record Count	330.000,00 € 165.000,00 € 2	110.000,00 € 36.666,67 € 3	120.000,00 € 120.000,00 € 1	370.000,00 € 185.000,00 € 2	395.000,00 € 197.500,00 € 2	1.325.000,00 € 132.500,00 € 10

Task 4: Business Case Analysis

In a short paragraph on the following slide, describe how using various reports in Salesforce would help SimplySocial make data-driven decisions. In your description, include:

- The overall purpose of reports, report filters, and report types
- The major steps you took to create various reports
- How SimplySocial would benefit from using reports

Task 4: Business Case Analysis



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The overall purpose of reports, report filters, and report types in Salesforce is to provide sales teams and stakeholders with valuable insights and actionable data to improve decision-making, enhance sales performance, and drive business growth. Reports in Salesforce allow users to analyze and visualize key metrics, such as sales revenue, pipeline, and forecasting, enabling them to identify trends, spot opportunities, and address challenges.

Creating various reports in Salesforce Sales Cloud whether tabular, summary or matrix report involves several major steps. First, I identified the data that need to be analyzed and selected the appropriate report type based on their requirements. Next, I customized the report by adding or removing fields, applying filters, and grouping data. The reports were then saved and Run.

Using reports Simply Social can gain valuable insights into their sales performance, customer behavior, and overall business trends. These reports provide real-time data visualization and analysis, enabling sales teams to make data-driven decisions, identify growth opportunities, and optimize their sales strategies for increased efficiency and revenue generation.

Task 5: Create a New Report



On the following slide, insert a screenshot of the new report you just created and ran.

Task 5: Create a New Report



Browser tabs: Inbox (17) - tao, Lilt sucht Enter, Coursera | Onlin, Building Report, Format Reports, Project

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Search bar: Search...

Navigation menu: Sales, Home, Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More

Report: Opportunities
SIMPLY SOCIAL CLOSED AND WON OPPORTUNITY

Buttons: Enable Field Editing, Add Chart, Filter, Refresh, Edit

Total Records: 19

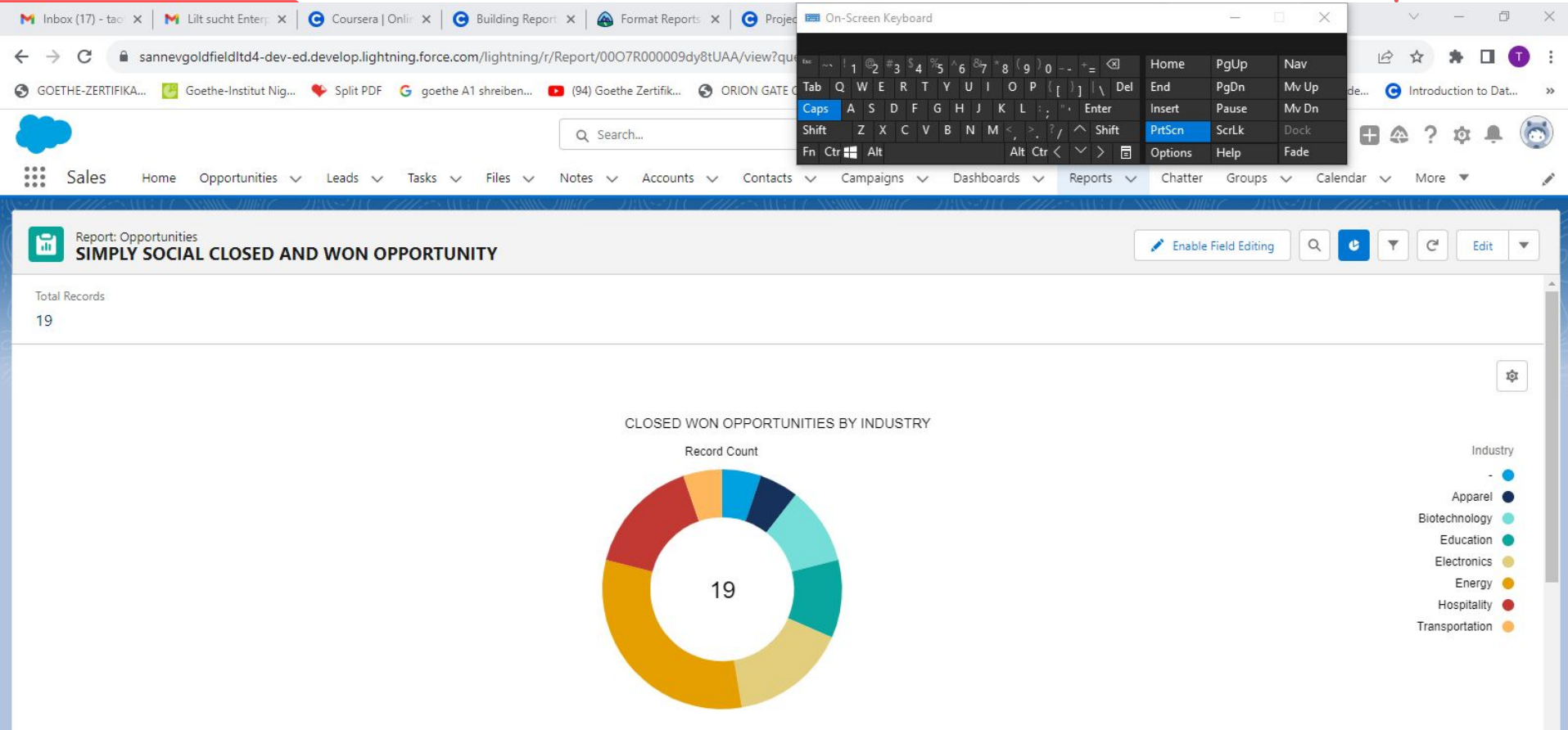
Industry ↑	Record Count
-	1
Apparel	1
Biotechnology	2
Education	2
Electronics	3
Energy	6
Hospitality	3
Transportation	1
Total	19

Task 6: Create Report Charts

On the following slides, insert screenshots of the charts you just created:

- *Step 1: All opportunities of all time that have been “Closed – Won” among new customers, with opportunities grouped by industry*
- *Step 2: All leads of all time that are currently “Working – Contacted”, grouped by lead source*
- *Step 3: Expected revenue of all time for open opportunities where probability is >30%*

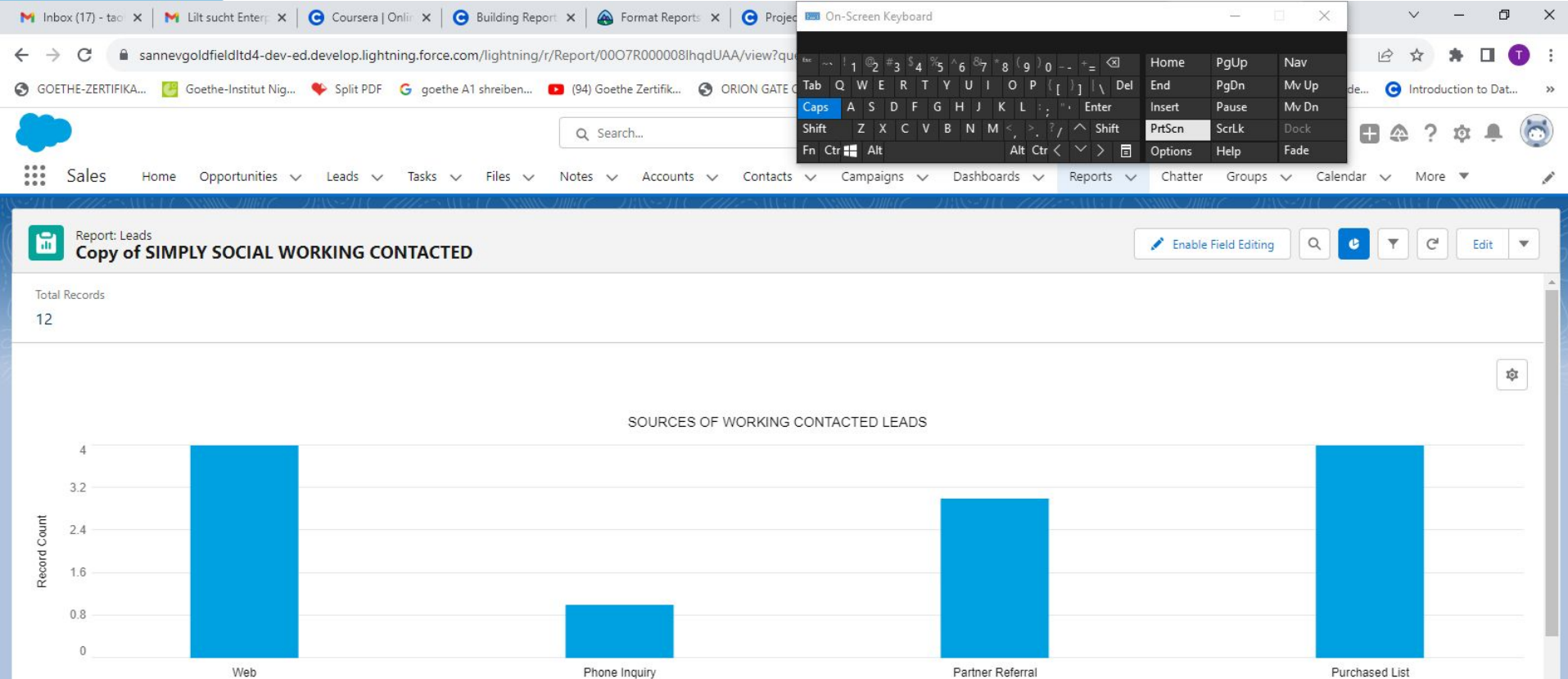
Task 6: Create Report Charts



Task 6: Create Report Charts



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Task 6: Create Report Charts

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Search bar: Search...

Navigation menu: Sales | Home | Opportunities | Leads | Tasks | Files | Notes | Accounts | Contacts | Campaigns | Dashboards | Reports | Chatter | Groups | Calendar | More

Report: Opportunities
EXPECTED REVENUE CHART

Enable Field Editing


Total Records: 10 | Total Amount: 1.325.000,00 € | Average Amount: 132.500,00 €

Chart Title: SIMPLY SOCIAL EXPECTED REVENUE

Y-axis: Sum of Amount (0 to 1.5M)

Legend (Stage):

- Id. Decision Makers (Blue)
- Negotiation/Review (Dark Blue)
- Perception Analysis (Teal)
- Proposal/Price Quote (Light Teal)
- Value Proposition (Yellow)



Task 7: Create a Dashboard

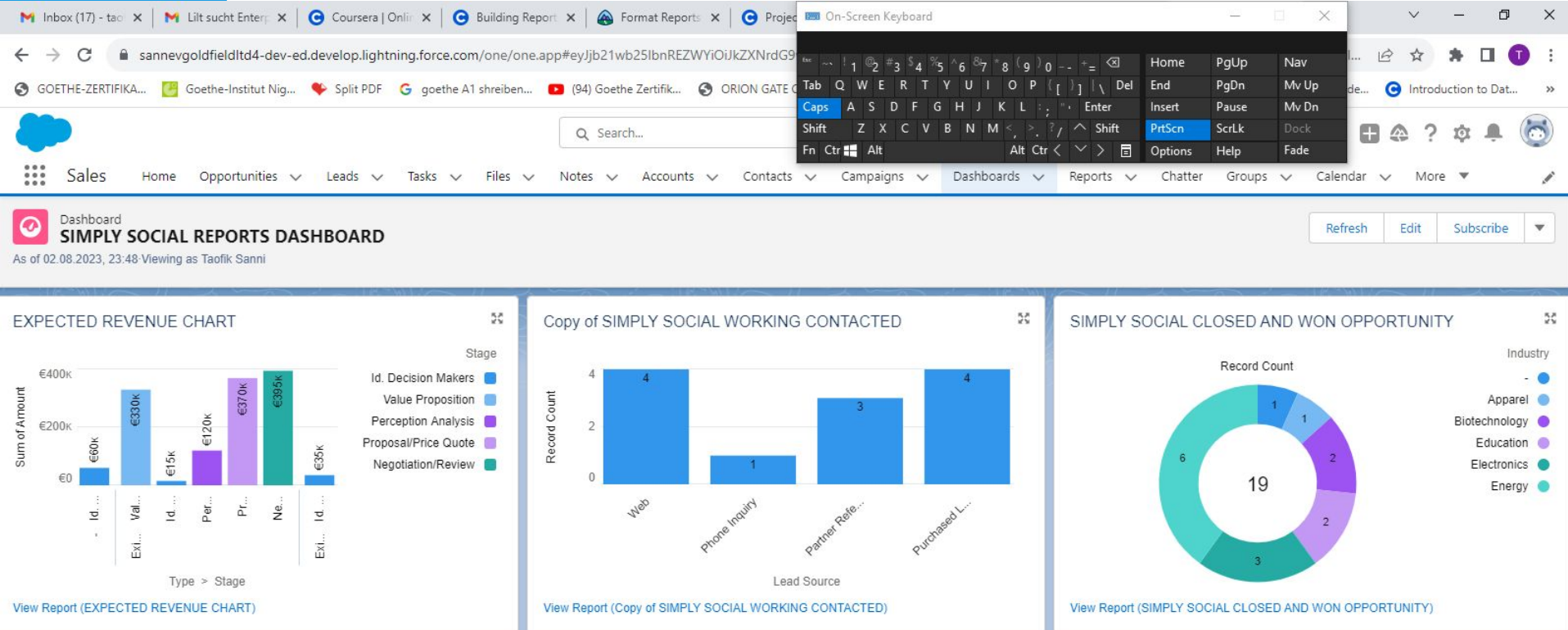


On the following slide, insert a screenshot of the dashboard you just created.

Task 7: Create a Dashboard



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You have reached the end of this **Project!**



This is the end of this Independent Project! Great job completing all these tasks in Salesforce. Make sure you download a copy of this deck for your portfolio.