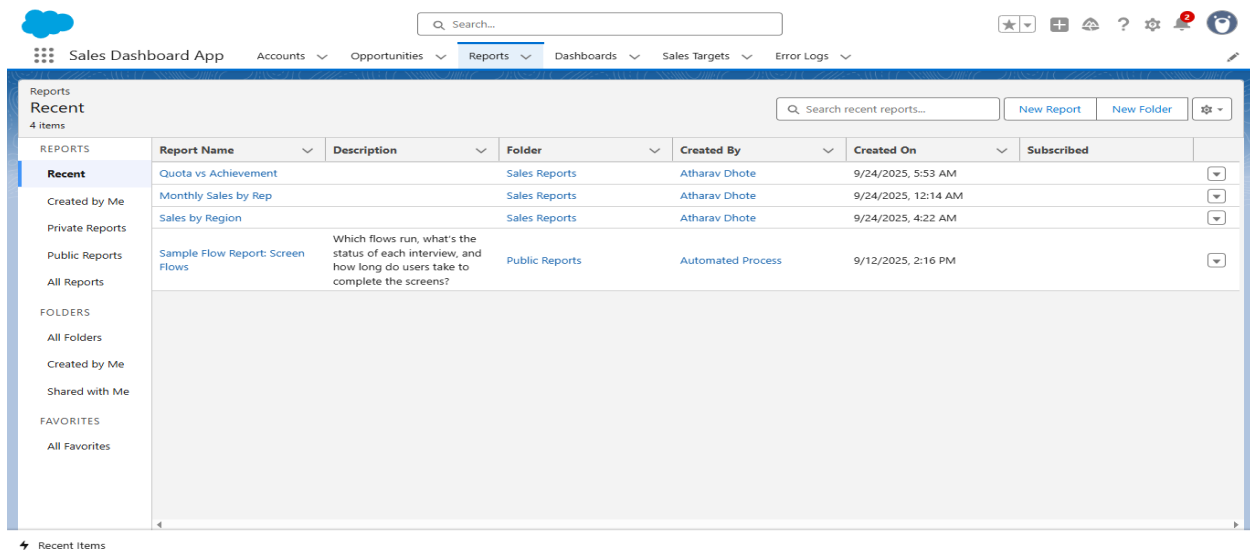


# Project Title: Sales Performance Reporting

## Phase 9: Reporting, Dashboards & Security Review

### Step 1: Reports Creation

- Built multiple reports to support sales analysis:
  - *Monthly Sales by Rep* → grouped by Opportunity Owner.
  - *Sales by Region* → grouped by Region field.
  - *Quota vs Achievement* → included custom fields and summary formulas.

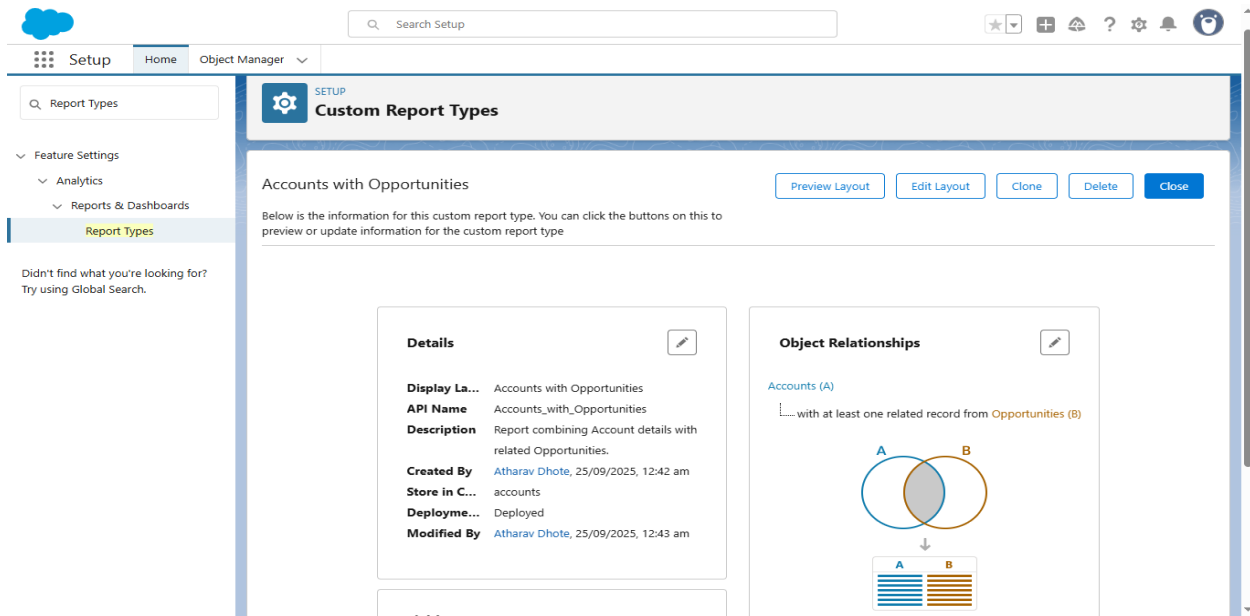


The screenshot displays the Salesforce Reports page. At the top, there's a navigation bar with tabs for Accounts, Opportunities, Reports (selected), Dashboards, Sales Targets, and Error Logs. Below this, a sidebar on the left lists various report categories: Recent (4 items), Created by Me, Private Reports, Public Reports, All Reports, Folders, All Folders, Created by Me, Shared with Me, Favorites, and All Favorites. The main content area shows a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists four reports: 'Quota vs Achievement', 'Monthly Sales by Rep', 'Sales by Region', and 'Sample Flow Report: Screen Flows'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Quota vs Achievement		Sales Reports	Atharav Dhote	9/24/2025, 5:53 AM	
Created by Me	Monthly Sales by Rep		Sales Reports	Atharav Dhote	9/24/2025, 12:14 AM	
Private Reports	Sales by Region		Sales Reports	Atharav Dhote	9/24/2025, 4:22 AM	
Public Reports	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, 2:16 PM	
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

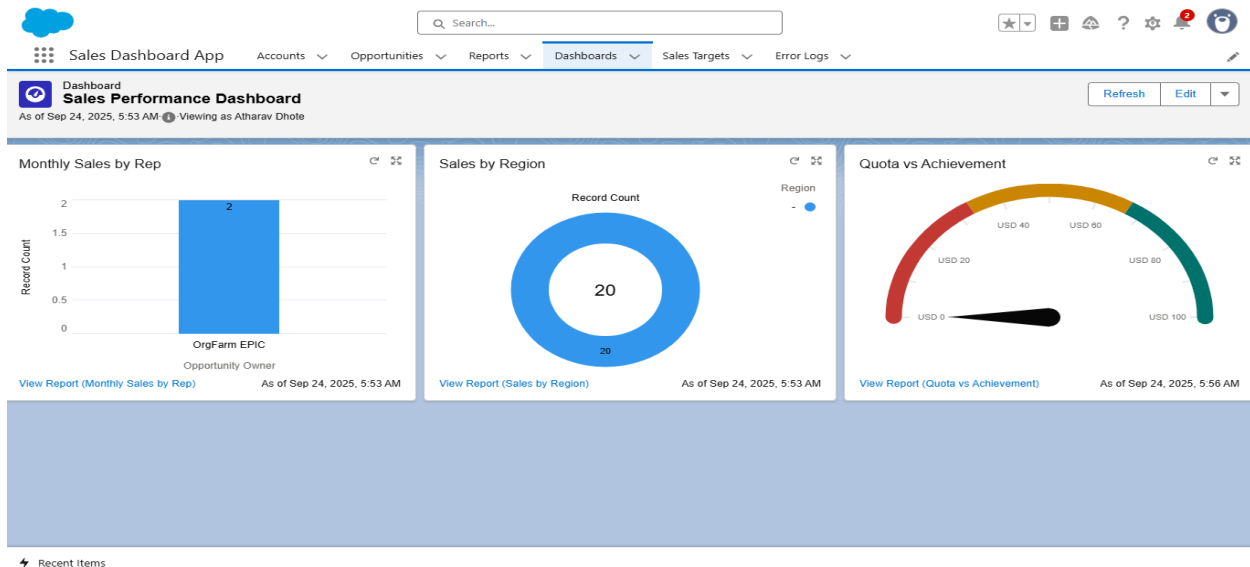
### Step 2: Report Types

- Created **Custom Report Types** to combine data across objects like Accounts and Opportunities.
- This allowed flexible reporting and deeper analysis.



### Step 3: Dashboards Development

- Designed a **Sales Performance Dashboard** in Lightning with the following components:
  - Bar Chart** → Monthly Sales by Rep.
  - Pie Chart** → Sales by Region.
  - Gauge Chart** → Quota Attainment %.



### Step 4: Dynamic Dashboards

- Configured dashboard settings to **“View as Dashboard Viewer.”**
- This ensured that each sales rep saw only their data, while managers had visibility into their entire team’s performance.

Sales Dashboard App

Accounts Opportunities Reports Dashboards Sales Targets Error Logs

Search...

Star Plus Cloud Help Settings 2 Profile

Sales Performance Dashboard

+ Widgets + Filter Refresh Undo Settings Save Done

Monthly Sales by Rep

Record Count

2

OrgFarm EPIC

Opportunity Owner

View Report (Monthly Sales by Rep)

Quota vs Achievement

USD 40 USD 60 USD 80 USD 100

USD 20

5

Quota vs Achievement

Properties

This dashboard is owned by Atharav Dhote

View Dashboard As

Me

Another person

The dashboard viewer

Let dashboard viewers choose whom they view the dashboard as

Dashboard Grid Size

12 columns (recommended)

9 columns

Dashboard Theme

Light

Dark

Cancel Save

Recent items

Recent items