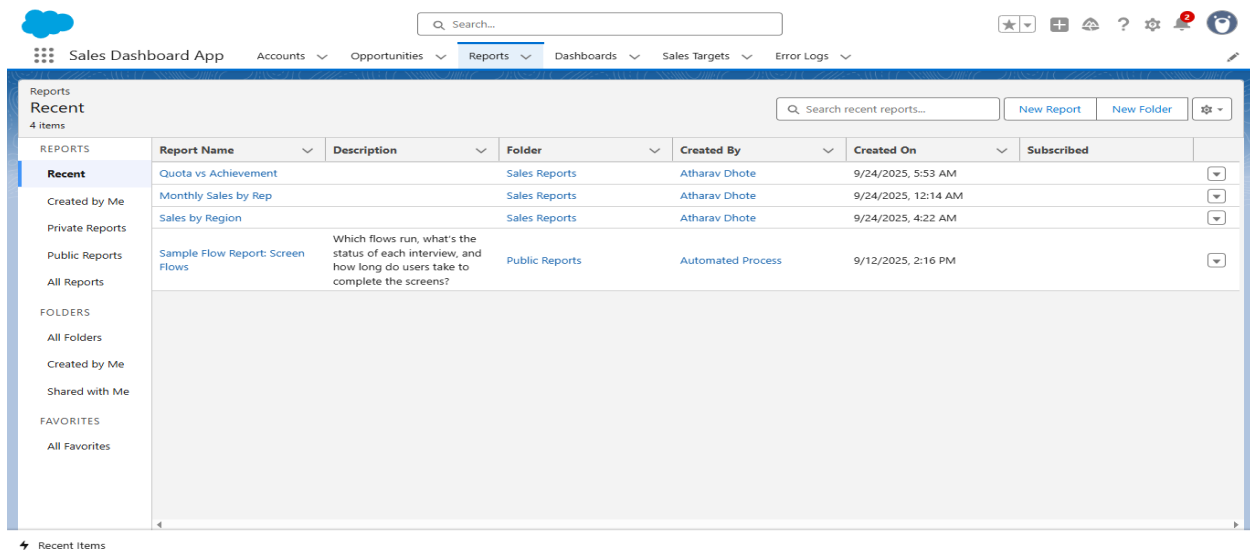# Project Title: Sales Performance Reporting

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.
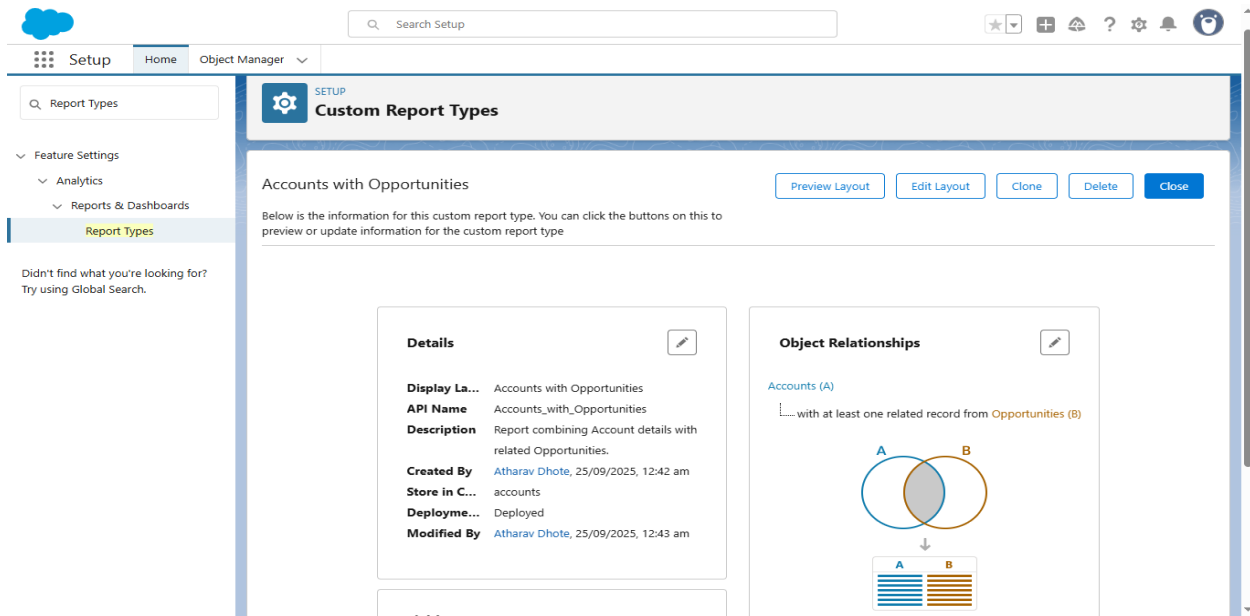

Step 2: Report Types

- 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 %.
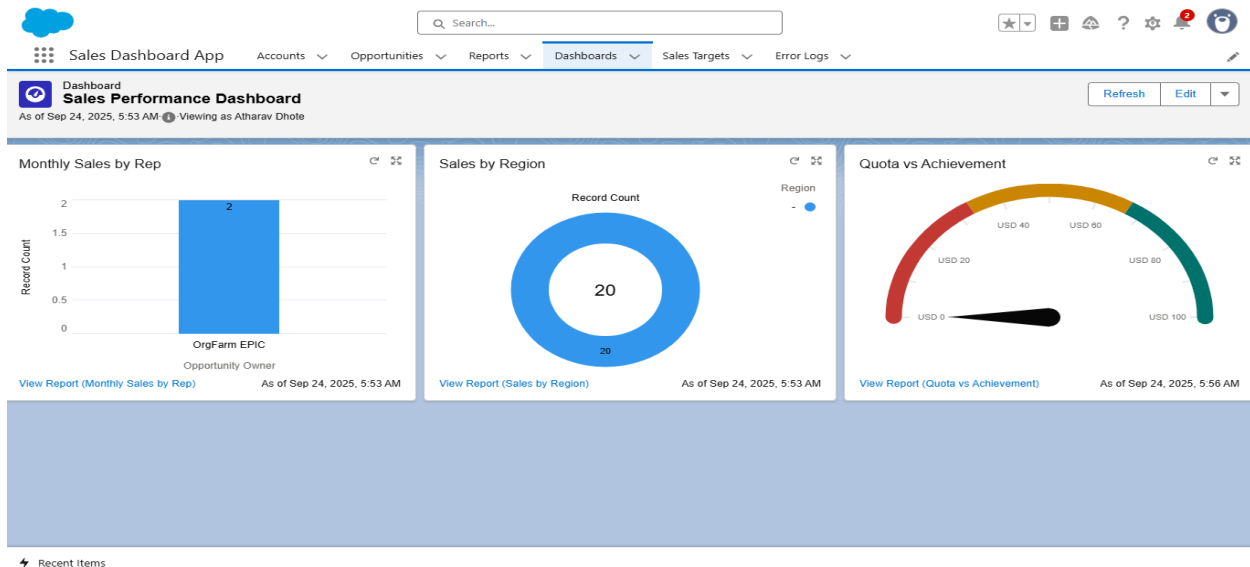
Step 4: Dynamic Dashboards

- 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.

Accounts ⌄   Opportunities ⌄   Reports ⌄   Dashboards ⌄   Sales Targets ⌄   Error Logs ⌄

Sales Performance Dashboard

+ Widget   + Filter   Save   Done

Monthly Sales by Rep

2

1.5

1

0.5

0

Record Count

OrgFarm EPIC

Opportunity Owner

View Report (Monthly Sales by Rep)

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

USD 40   USD 60

USD 20   USD 80

USD 100

chievement

uota vs Achievement)

⚡ Recent Items