

# Reports and Dashboards in Salesforce

Independent Project: Use Salesforce to Create Reports and Dashboards

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# Project Overview



1

**Task 1:** Create a Tabular Report

2

**Task 2:** Create a Summary Report

3

**Task 3:** Create a Matrix Report

4

**Task 4:** Business Case Analysis

# Project Overview

5

Task 5: Create a New Report

6


Task 6: Create Report Charts

7

Task 7: Create a Dashboard

# Task 1: Create a Tabular Report



<div><div> Report: Opportunities</div><div><b>Tabular Report-Opportunities Closed-Won</b></div></div> <div><div>Enable Field Editing</div><div>Q</div><div>Add Chart</div><div>▼</div><div>C</div><div>Edit</div><div>▼</div></div>				
Total Records		Total Expected Revenue		
7		\$1,790,000.00		
	Opportunity Name ▼	Stage ▼	Type ▼	Expected Revenue ▼
1	<a href="#">Express Logistics Standby Generator</a>	Closed Won	New Customer	\$220,000.00
2	<a href="#">GenePoint Standby Generator</a>	Closed Won	New Customer	\$85,000.00
3	<a href="#">Edge Emergency Generator</a>	Closed Won	New Customer	\$75,000.00
4	<a href="#">University of AZ Portable Generators</a>	Closed Won	New Customer	\$50,000.00
5	<a href="#">United Oil Refinery Generators</a>	Closed Won	New Customer	\$915,000.00
6	<a href="#">Burlington Textiles Weaving Plant Generator</a>	Closed Won	New Customer	\$235,000.00
7	<a href="#">Grand Hotels Emergency Generators</a>	Closed Won	New Customer	\$210,000.00
8				\$1,790,000.00

# Task 2: Create a Summary Report



Sales Home Opportunities Leads Tasks Files Notes Accounts Contacts Campaigns Dashboards Reports Chatter Groups

Report: Leads  
**Lead with Working contacted** [Enable Field Editing](#) [Add C](#)

Total Records  
12

Lead Source	First Name	Last Name	Title	Company / Account	Email	Lead Status
Web (4)	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida	bertha@fcof.net	Working - Contacted
	Brenda	McClure	CFO	Cardinal Inc.	brenda@cardinal.net	Working - Contacted
	Tom	James	SVP, Production	Delphi Chemicals	tom.james@delphi.chemicals.com	Working - Contacted
	Norm	May	VP, Facilities	Greenwich Media	norm_may@greenwich.net	Working - Contacted
Subtotal						
Phone Inquiry (1)	Violet	MacLeod	VP, Finance	Emerson Transport	violetm@emersontransport.com	Working - Contacted
Subtotal						
Partner Referral (3)	Patricia	Feager	CEO	International Shipping Co.	patricia_feager@is.com	Working - Contacted
	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	shellyb@westerntelecom.com	Working - Contacted
	Kristen	Akin	Director, Warehouse Mgmt	Aethna Home Products	kakin@athenahome.com	Working - Contacted
Subtotal						
Purchased List (4)	Kathy	Snyder	Regional General Manager	TNR Corp.	kaynder@tnr.net	Working - Contacted
	David	Monaco	CFO	Blues Entertainment Corp.	david@blues.com	Working - Contacted
	Sandra	Fierhast	VP, Production	Highland Manufacturing Ltd.	sandra_e@highland.net	Working - Contacted

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

# Task 3: Create a Matrix Report



Report: Opportunities							
Opportunities Matrix Report Prob. > 30%							
<a href="#">Enable Field Editing</a> <a href="#">Add Chart</a> <a href="#">Edit</a>							
Total Records	Total Expected Revenue	Average Expected Revenue					
10	\$948,000.00	\$94,800.00					
Type	Stage	Value Proposition	Id. Decision Makers	Perception Analysis	Proposal/Price Quote	Negotiation/Review	Total
Existing Customer - Replacement	Sum of Expected Revenue	\$0.00	\$21,000.00	\$0.00	\$0.00	\$0.00	\$21,000.00
	Average Expected Revenue	\$0.00	\$21,000.00	\$0.00	\$0.00	\$0.00	\$21,000.00
	Record Count	0	1	0	0	0	1
Existing Customer - Upgrade	Sum of Expected Revenue	\$165,000.00	\$84,000.00	\$272,500.00	\$355,500.00	\$891,000.00	
	Average Expected Revenue	\$82,500.00	\$9,000.00	\$84,000.00	\$138,750.00	\$177,750.00	\$111,375.00
	Record Count	2	1	2	2	8	
-	Sum of Expected Revenue	\$0.00	\$36,000.00	\$0.00	\$0.00	\$0.00	\$36,000.00
	Average Expected Revenue	\$0.00	\$36,000.00	\$0.00	\$0.00	\$0.00	\$36,000.00
	Record Count	0	1	0	0	0	1
Total	Sum of Expected Revenue	\$165,000.00	\$84,000.00	\$272,500.00	\$355,500.00	\$891,000.00	
	Average Expected Revenue	\$82,500.00	\$22,000.00	\$84,000.00	\$138,750.00	\$177,750.00	\$111,375.00
	Record Count	2	1	2	2	8	
Details (10 Rows) <a href="#">Click an intersection in the table above to filter details.</a>							
Opportunity Owner	Account Name	Opportunity Name	Amount	Expected Revenue	Probability (%)		
1 Steven Nguyen	Edge Communications	Edge Emergency Generator	\$35,000.00	\$21,000.00	60%		
2 Steven Nguyen	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	\$250,000.00	\$125,000.00	50%		
3 Steven Nguyen	Express Logistics and Transport	Express Logistics Portable Truck Generators	\$80,000.00	\$40,000.00	50%		
4 Steven Nguyen	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	\$15,000.00	\$9,000.00	60%		
5 Steven Nguyen	Express Logistics and Transport	Express Logistics SLA	\$120,000.00	\$84,000.00	70%		
6 Steven Nguyen	United Oil & Gas Corp.	United Oil Refinery Generators	\$270,000.00	\$202,500.00	75%		
7 Steven Nguyen	University of Arizona	University of AZ Installations	\$100,000.00	\$75,000.00	75%		
8 Steven Nguyen	United Oil & Gas Corp.	United Oil Office Portable Generators	\$125,000.00	\$112,500.00	90%		
9 Steven Nguyen	United Oil & Gas Corp.	United Oil Installations	\$270,000.00	\$243,000.00	90%		

# Task 4: Business Case Analysis

Reports in Salesforce are a powerful tool for displaying and summarizing data from both standard and custom objects in your organization. They allow users to view and analyse data in a structured, organized, and visually appealing format. The primary purpose of reports is to help users track trends, make informed decisions, and monitor the performance of different aspects of their business. Salesforce offers several types of reports, each serving a specific need:

- **Tabular Reports:** Display data in a simple table format, ideal for straightforward lists.
- **Summary Reports:** Group data into categories and provide subtotals and totals for a more organized view.
- **Matrix Reports:** Show data in a grid format with row and column groupings, making them perfect for comparisons.
- **Joined Reports:** Combine multiple report types into a single report for a comprehensive overview.
- **Report filters** play a key role in refining the data displayed. They allow users to focus on specific criteria or subsets of data by setting conditions that must be met. Filters are essential for answering targeted questions or conducting detailed analyses, ensuring that users get the most relevant insights from their reports.

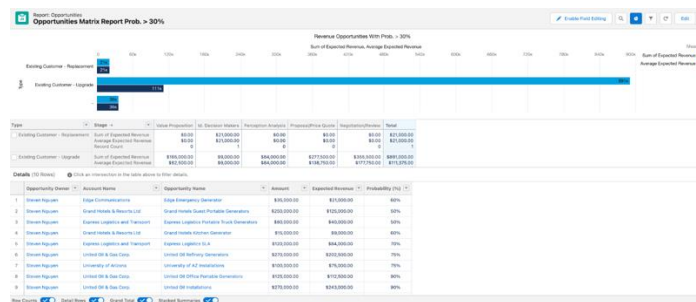
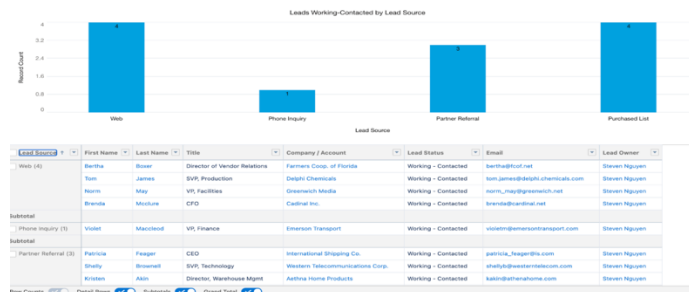
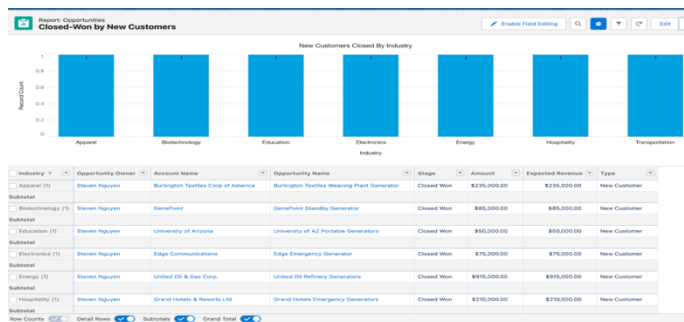
# Task 5: Create a New Report



Report: Opportunities Closed-Won by New Customers						
Total Records 7						
Industry	Account Name	Opportunity Name	Stage	Amount	Expected Revenue	Type
Apparel (1)	Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	Closed Won	\$235,000.00	\$235,000.00	New Customer
Subtotal						
Biotechnology (1)	GenePoint	GenePoint Standby Generator	Closed Won	\$85,000.00	\$85,000.00	New Customer
Subtotal						
Education (1)	University of Arizona	University of AZ Portable Generators	Closed Won	\$50,000.00	\$50,000.00	New Customer
Subtotal						
Electronics (1)	Edge Communications	Edge Emergency Generator	Closed Won	\$75,000.00	\$75,000.00	New Customer
Subtotal						
Energy (1)	United Oil & Gas Corp.	United Oil Refinery Generators	Closed Won	\$915,000.00	\$915,000.00	New Customer
Subtotal						
Hospitality (1)	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	Closed Won	\$210,000.00	\$210,000.00	New Customer
Subtotal						
Transportation (1)	Express Logistics and Transport	Express Logistics Standby Generator	Closed Won	\$220,000.00	\$220,000.00	New Customer
Subtotal						
Total (7)						



# Task 6: Create Report Charts



# Task 7: Create a Dashboard



Dashboard title had to be cropped out as screenshot wouldn't capture all of dashboard