Phase 9: Reports & Analytics

Objective

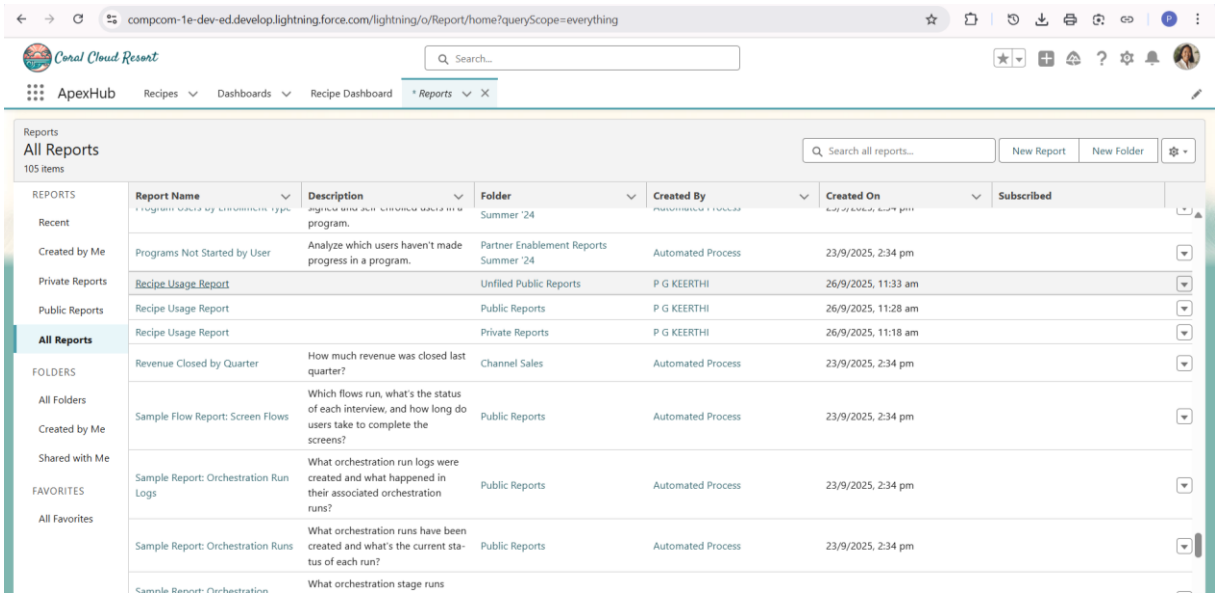
Phase 9 demonstrates how ApexHub provides analytical insights into recipe usage, enabling developers, team leads, and managers to track activity, understand trends, and make data-driven decisions.

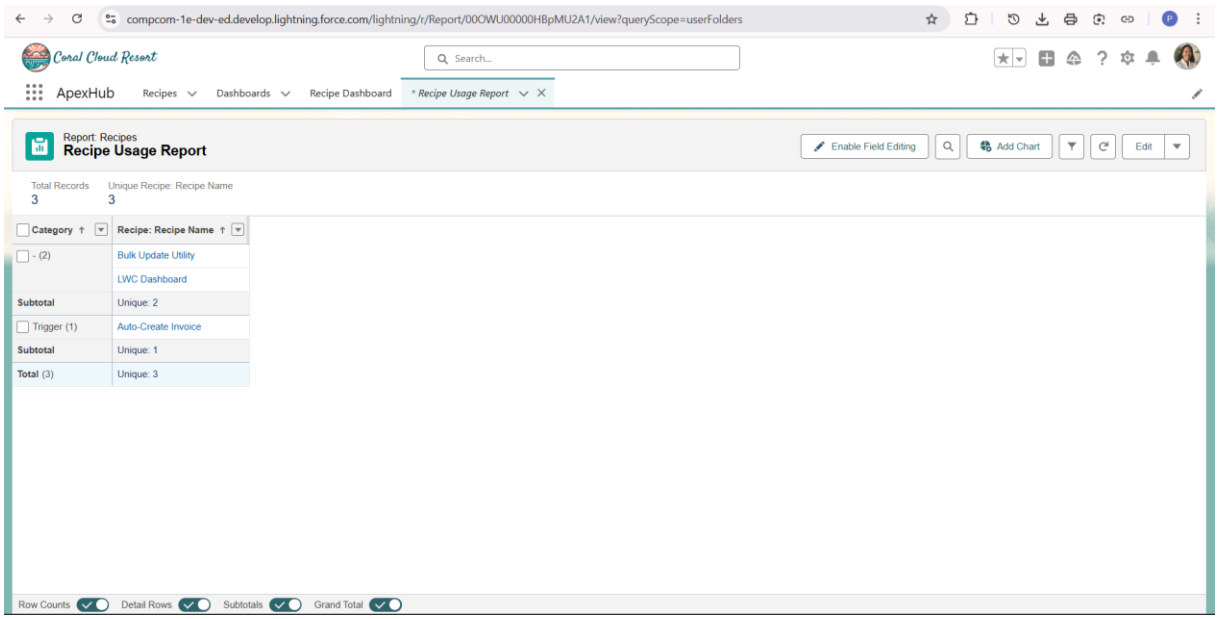
The phase emphasizes the visualization of data through dashboards, charts, and summary metrics, highlighting the professional and enterprise-ready nature of the project.

Key Activities

1. Custom Report Creation

- Created a Summary Report on the Recipes object.
- Report Grouping: By Category (Trigger, LWC, Class, Utility).
- Report Columns: Recipe Name, Category, Created Date, Auto Create Invoice.
- Filters:
    - Display recent recipes (last 30 days).
    - Optionally filter by Category for focused insights.
- Reason for Summary Report: Lightning Dashboard charts require Summary or Matrix reports for visualization; Tabular reports cannot show charts.

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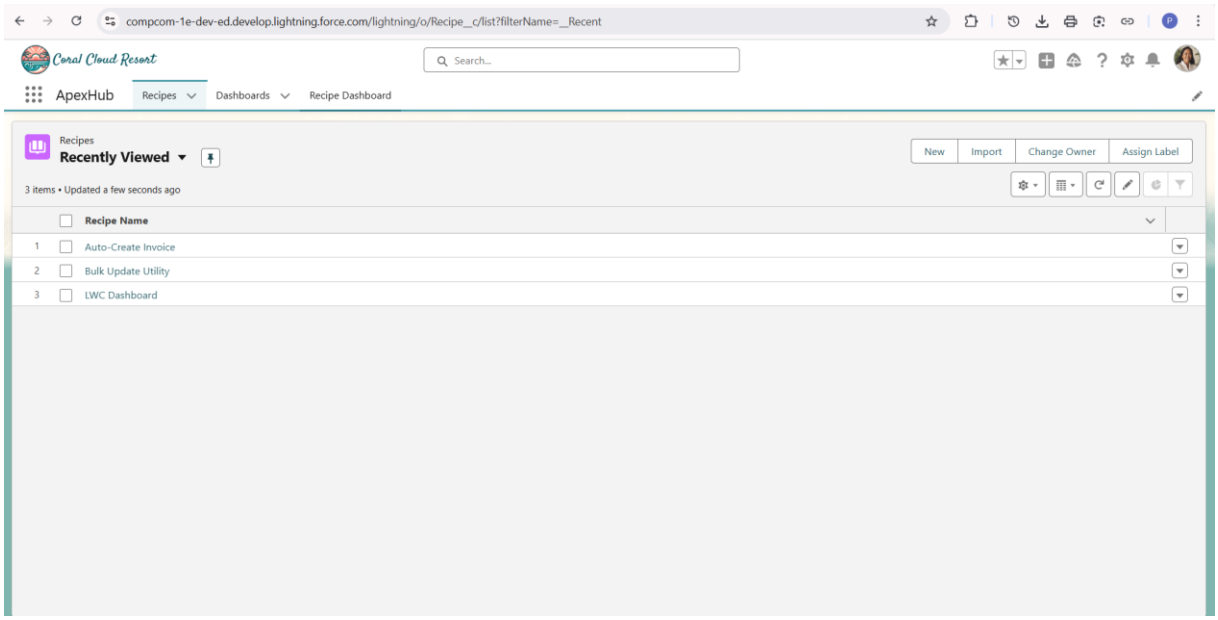
Coral Cloud Resort
Search...
ApexHub
Recipes
Dashboards
Recipe Dashboard
* Recipe Usage Report
Report: Recipes
Recipe Usage Report
Enable Field Editing
Add Chart
Edit
Total Records
3
Unique Recipe: Recipe Name
3
Category
Recipe: Recipe Name
- (2)
Bulk Update Utility
LWC Dashboard
Subtotal
Unique: 2
Trigger (1)
Auto-Create Invoice
Subtotal
Unique: 1
Total (3)
Unique: 3
Row Counts
Detail Rows
Subtotals
Grand Total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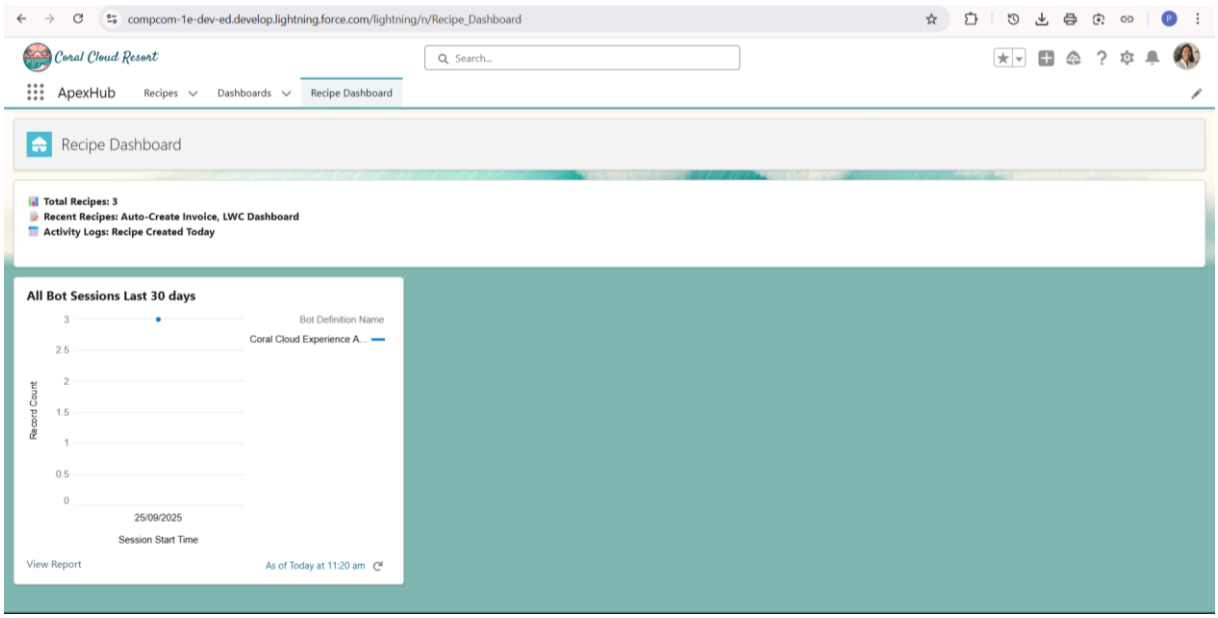
Coral Cloud Resort
Search...
ApexHub
Recipes
Dashboards
Recipe Dashboard
Recipes
Recently Viewed
3 items • Updated a few seconds ago
New
Import
Change Owner
Assign Label
Recipe Name
1
Auto-Create Invoice
2
Bulk Update Utility
3
LWC Dashboard

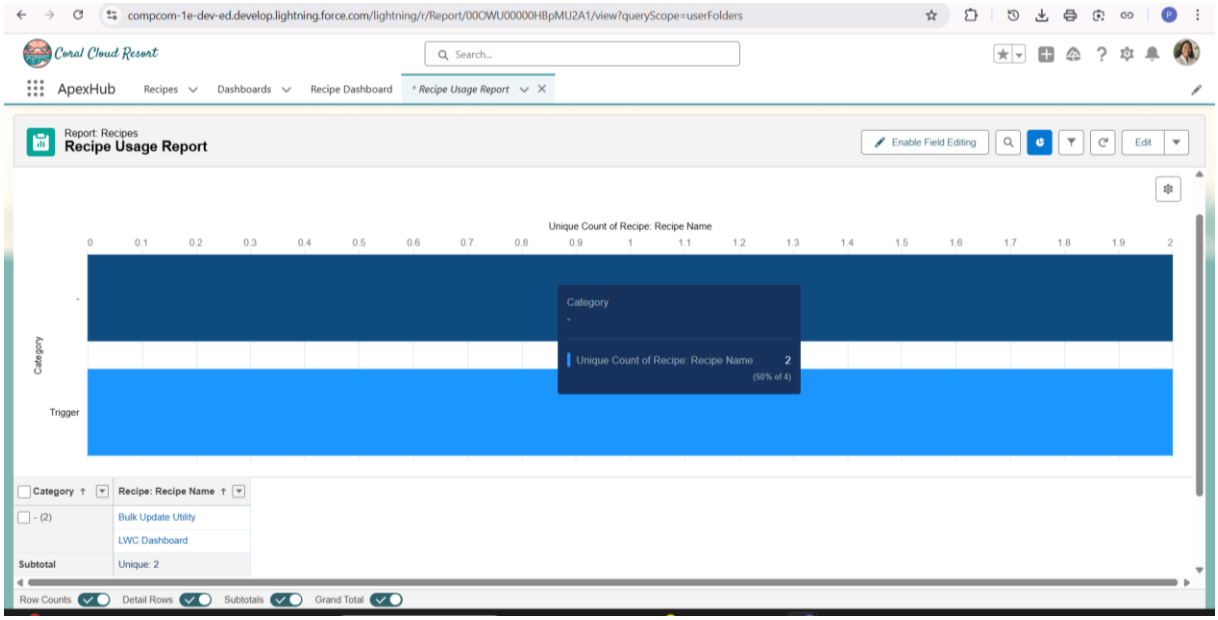
2. Dashboard Integration

- Added a Report Chart component to the Recipe Dashboard.
- Chart Types: Pie or Bar (demonstrating recipe distribution by category).
- Rich Text Cards:
    - Total Recipes: 3–5 (fake/sample number for demo).
    - Recent Recipes: e.g., “Auto Create Invoice,” “LWC Dashboard,” “Bulk Update Utility.”
    - Activity Logs: e.g., “Recipe Created Today,” “Recipe Modified Today.”
- Purpose: Gives quick insights alongside chart visualization, simulating a real enterprise dashboard.



3. Enhanced Visualization

- Pie Chart or Bar Chart highlights distribution of recipes by category.
- Rich Text cards provide summary metrics for quick reference.
- Layout is clean, responsive, and professional, reflecting modern Salesforce Lightning UX.



Importance

- Provides actionable insights for managers and developers.
- Highlights reporting and visualization skills using Salesforce Lightning components.
- Completes the end-to-end workflow from recipe creation to analytics.
- Enhances the professional look of ApexHub for stakeholders and evaluators.

Expected Outcomes

- Provides **clear visual analytics** for the project.
- Demonstrates **integration of reports, charts, and dashboards** in Salesforce.
- Simulates **real enterprise usage metrics**, even with demo data.
- Completes the **end-to-end demonstration**, supporting the final presentation of ApexHub.