

Day -7 Reports and Dashboards

Reports: They are a graphical representation of charts.

Dashboards: Group of Reports.

Report Types: This is something like Mail Templates.

Type of Filters:

Standard: These are standard fields applicable to every Report Type.

#Show Me &

#Created Date.

Field: Applicable for different fields when added to the filter.

Filter Logic: Like 1 OR 2.

Cross Filter: A filter can be added for the child objects.

1. Accounts with opportunities

Row Limit: No of records to show.

Format your reports: There are 3 different formats to format the report in Salesforce.

1. Tabular: Same as Excel
2. Summary: Can group by rows
3. Matrix: Can be grouped based on Rows and Columns.

Group by Rows: All the row values will be divided into rows

The same applies to the columns.

Dynamic Dashboards: Based on Access levels, we will group these dashboards.

Charts: To display the data in a graphical way

One or more charts can form a dashboard.

Gauge Chart: To display one value within the range

123 -> When you have only one key value to display