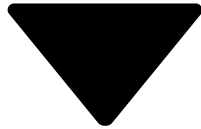


1. [Create Reports and Dashboards for Sales and Marketing Managers](#)



2. [Visualize Your Data](#)

Visualize Your Data



When it comes to reports and analyzing what seems like endless data, it can be information overload. What if there was an easy way to get a visual summary of all that information? Enter report charts and dashboards.

Report Charts




The Lightning Experience offers enhanced data charts to summarize reported data. You can adjust the chart type without making changes to the report itself.

Let's see charts in action. Your CEO is so impressed with the work you've done, he's asked for something special. He wants a way to display sales rep performance graphically.

Add a vertical bar chart to compare sales rep win rates:

1. Click the **Reports** tab.
2. Click on **Sales Rep Win Rates** then click **Add Chart**  to display a chart.
3. Click the **gear icon**  in the upper right corner of the chart to open the chart editor.



4. Click **Column**  to change the display to a vertical bar chart.
5. Complete the chart attributes:
 - a. Chart Title: **Sales Rep Win Rates**
 - b. Click the Y-Axis dropdown and set to **Win Rate**
6. Click the **gear icon**  to close the chart editor.
7. Click the **arrow**  next to Edit and choose **Save** from the dropdown.

Dashboards

Let's take visualizing data a step further. The VP of Sales would like a Global Sales dashboard that lets her see the key information at a glance. A dashboard is a visual representation of data from multiple reports and does the following:

- Displays data from custom source reports
- Has a running user to determine what data is visible
- Displays data as of the last time the dashboard was refreshed
- Can be scheduled to be refreshed and emailed automatically

The dashboard editor in Lightning Experience gives you a responsive way of creating or editing dashboards using drag-and-drop. Let's take a look.


Create the Global Sales dashboard:

1. Click the **Dashboards** tab.
2. Click **New Dashboard**.
3. Set the Name to **Global Sales Dashboard**.
4. Click **Select Folder**, choose the **Global Sales Dashboards**, then click **Select Folder**.
5. Click **Create**.


Add an Opportunities by Rep chart component:

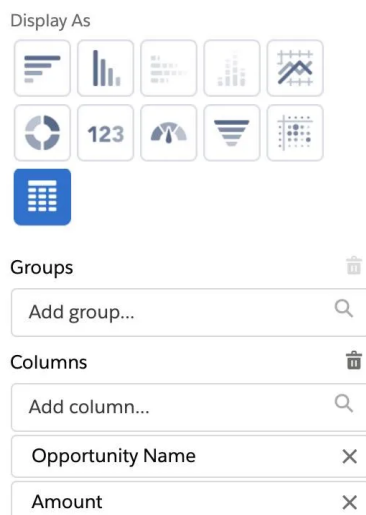
1. Click **+Component**.
2. In the report search bar, enter **Opportunities**, click **Opportunities by Rep**, then click **Select**.
3. From the Display As menu, click the **Vertical Bar Chart**  option.
4. Ensure the Y-Axis is set to **Record Count**.
5. Ensure the **Show Values** box is selected.
6. Complete the text areas:
 - Title: **Sales Pipeline**
 - Subtitle: **Number of Open Opportunities by Rep**
7. Click **Add**.
8. Click **Save**.

Add Opportunities by Rep metric component:

1. Click **+Component**.
2. In the report search bar, enter **Opportunities**, click **Opportunities by Rep**, then click **Select**.
3. From the Display As menu, select the **Metric**  option.
4. Ensure Measure is set to **Sum of Amount** and Display Units is set to **Shortened Number**.
5. Leave the segment ranges set as is.
6. Complete the text areas:
 - Title: **Total Open Opportunities**
 - Footer: **Value of open opps in sales pipeline**
7. Click **Add**.
8. Drag the metric component to the right of the Opps by Rep vertical bar chart.
9. Click **Save**.

Add the Sales Rep Win Rates table component:

1. Click **+Component**.
2. In the report search bar, enter **Sales Rep**, click **Sales Rep Win Rates**, then click **Select**.
3. Select **Lightning Table**  from the Display As menu.
4. In the Columns section, click the **X** next to the following columns to remove them from this component:
 - Account Name
 - Stage
 - Expected Revenue
 Note: Opportunity Name and Amount should be the only remaining columns.




Preview

Opportunities Won	
Opportunity Name	Amount ↓
United Oil Refinery Generators	\$915.00k
United Oil Emergency Generators	\$440.00k
Grand Hotels Generator Installations	\$350.00k
United Oil Installations	\$270.00k
Burlington Textiles Weaving Plant Generator	\$235.00k
United Oil Installations	\$235.00k
Express Logistics Standby Generator	\$220.00k
Grand Hotels Emergency Generators	\$210.00k

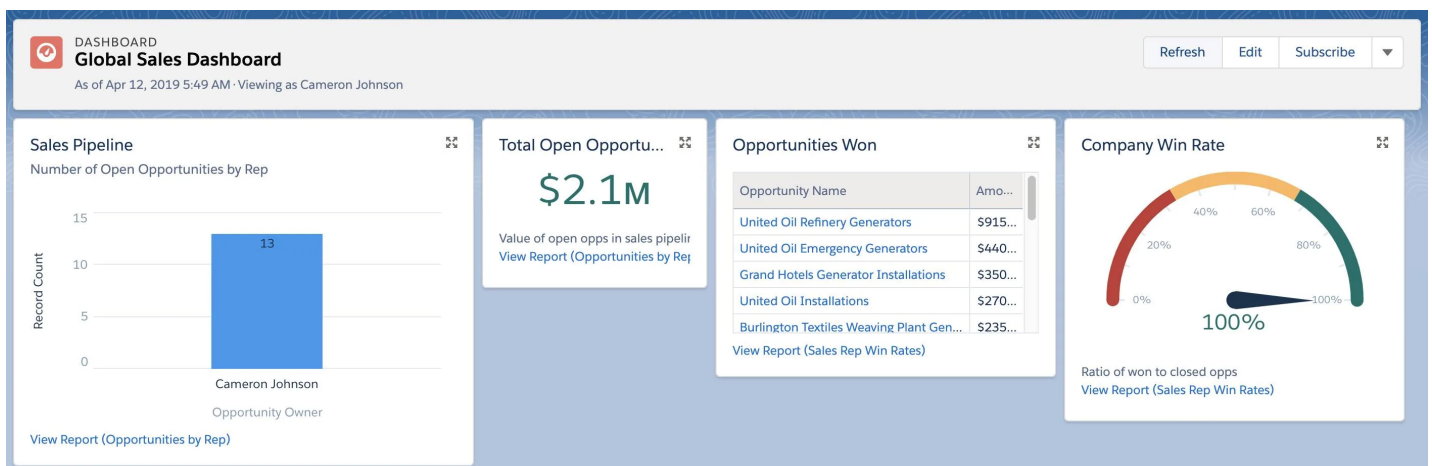
View Report (Sales Rep Win Rates)

5. Update the Title to **Opportunities Won**.
6. Click **Add**.
7. Drag the **Opportunities Won** table to the right of the Total Open Opportunities metric, to create a third dashboard column.
8. Click **Save**.

Add Sales Rep Win Rates gauge component:

1. Click **+Component**.
2. In the report search bar, enter **Sales Rep**, click **Sales Rep Win Rates**, and then click **Select**.
3. From the Display As menu, select the **Gauge Component**  option.
4. Leave the Segment Ranges as is.
5. Change the Measure to **Win Rate**.
6. Complete the text areas.
 - o Title: **Company Win Rate**
 - o Footer: **Ratio of won to closed opps**
7. Click **Add**.
8. Drag the **Company Win Rate** gauge to the right of the Opportunities Won component, to create a fourth dashboard column.
 - o You will need to resize the chart components to create four columns.

Note: Don't worry, component arrangement on your dashboard is not checked when verifying this step.
9. Click **Save**.
10. Click **Done**.



Congrats! You made it easier for your stakeholders to review their Salesforce data with ease and efficiency. You harnessed the power of Report Builder to customize Salesforce objects and fields into meaningful information. Filters, report types, charts, and dashboards further segmented your data so only the most important information was presented. Great job—you just saved your executive team a lot of time and energy!

Assessment Complete!

+100 points



Create Reports and Dashboards for Sales and Marketing Managers
100%

Progress: 100%

Retake this Step

[View more projects](#)