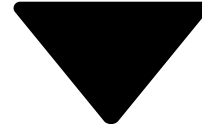


⚙️ Attention Salesforce Certified Trailblazers! Maintain your credentials and link your Trailhead and Webassessor accounts by December 6th. [Learn more.](#)

1. [Reports & Dashboards for Lightning Experience](#)



2. [Introduction to Reports and Dashboards in Lightning Experience](#)

Introduction to Reports and Dashboards in Lightning Experience

Learning Objectives

After completing this unit, you'll be able to:

- Phrase business needs as answerable reporting questions.
- Explain the difference between a report, dashboard, and report type.

Introduction to Reports and Dashboards

Your business has questions. Your Salesforce data has the answers. When you get asked to build a report, the request typically comes in the form of a question. The question might be something like:

- Which products are my top sellers?
- Who are my highest value prospects?
- Which marketing campaigns have been the most successful?
- How satisfied are my customers?

Before building a report, the trick is to take that question, ask follow-up questions, write requirements, and then map those requirements to report criteria.

Take the story of Maria Jimenez, the admin at Ursa Major Solar. One day her CEO, Sita Nagappan-Alvarez, came to her with questions about how the business was doing; specifically, she wanted to know which products were top sellers.



Maria took Sita's original question, and followed up with some clarifying questions.

Type of Information	Examples
Sita's Original Question	Which products are my top sellers?
Maria's Follow-up Questions	<ul style="list-style-type: none">• What makes a product a top seller, revenue or quantity?• Do you want to see the results grouped by product family?• What is your date range?• If we stop selling a product, should it show on the report?
Requirements	<ul style="list-style-type: none">• "Top sellers" here means quantity rather than revenue.• Group products by product family.• Show all Closed Won opportunities.• Do not show inactive products.

Type of Information	Examples
Criteria	<ul style="list-style-type: none">• Report Type = Opportunities with Products• Report Format = Summary• Grouping = Product Family• Show = All Opportunities• Date Field = Close Date• Range = Current FY• Filter = Product 'equals' Active• Filter = Opportunity Stage 'equals' Closed Won• Filter Logic = 1 AND 2

Now at this moment, you might be looking at that Criteria column and thinking, what does all of that mean? Rest assured, we'll cover those topics in detail as you work toward earning your badge for this module.

The point is, most people at your company will come to you with questions just like the one Sita asked Maria. Here are some typical questions people at Ursa Major Solar ask Maria.

- Lincoln Ulrich, an account executive planning the day's calls, asks which prospects his team should contact first.
- Roberto Alvarez, the COO, analyzing deflection rate month-over-month since rolling out that self-service community last summer, asks for cases over the past year.
- Sita, the CEO, busily crafting the company's annual plan, and making decisions about where to take the company next, asks which cities have the most leads.

For each of these scenarios, a report or dashboard can provide the insight each team member needs to take action and go big, whether it's that day, month, or year. You can be the person who translates their question into the report or dashboard they need.

Read on to learn how to get started with reports and dashboards for your company. And, if you like videos, check out this reports and dashboards overview video.



What is a report?

In its simplest form, a report is a list of records (like opportunities or accounts) that meet the criteria you define. But reports are much more than simple lists. To get the data you need, you can filter, group, and do math on records. You can even display them graphically in a chart!

When Sita asked Maria which products are top sellers, Maria created a report that returned a list of all opportunities with products. Then, she:

- Filtered to show only Closed Won opportunities for “active” products from this financial year.
- Grouped by product family.
- Summed the total number sold.
- Displayed the results in a vertical bar chart, so Sita could easily see the results.

This sort of advanced analysis is one reason why reports are Maria’s go-to tool when she has questions about her business. Everyone at Ursa Major Solar loves Maria’s reports!

Every report is stored in a folder. Report folders determine how reports are accessed, and who can access them to view, edit, or manage. Folders can be public, hidden, or shared. You control who has access to the contents of the folder based on roles, permissions, public groups, territories, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

What is a dashboard?

A dashboard is a visual display of key metrics and trends for records in your org. The relationship between a dashboard component and report is 1:1; for each dashboard component, there is a single source report. However, you can use the same report in multiple dashboard components on a single dashboard (for example, use the same report in both a bar chart and pie chart). You can display multiple dashboard components on a single dashboard page, creating a powerful visual display and a way to consume multiple reports that often have a common theme, like sales performance or customer support.

Like reports, dashboards are stored in folders, which control who has access. If you have access to a folder, you can view its dashboards. However, to view the dashboard components, you need access to the underlying reports as well.

Each dashboard has a running user, whose security settings determine which data to display in a dashboard. If the running user is a specific user, all dashboard viewers see data based on the security settings of that user—regardless of their own personal security settings. For this reason, you'll want to choose the running user wisely, so as not to open up too much visibility. For example, set the sales manager as the running user for a leaderboard for her team. This allows her team members to view the leaderboard for their individual team, but not other teams.

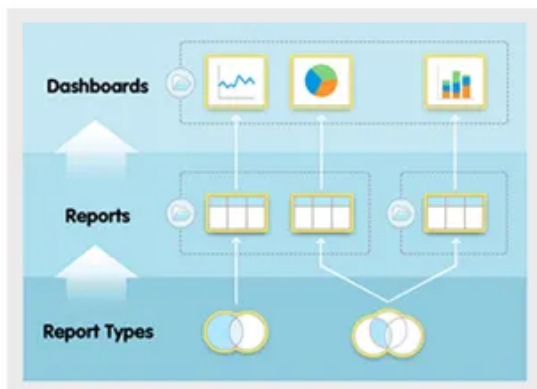
Dynamic dashboards are dashboards for which the running user is always the logged-in user. This way, each user sees the dashboard according to his or her own access level. If you're concerned about too much access, dynamic dashboards might be the way to go.

What is a report type?

A report type is like a template that makes reporting easier. The report type determines which fields and records are available for use when creating a report. This is based on the relationships between a primary object and its related objects. For example, with the 'Contacts & Accounts' report type, 'Contacts' is the primary object and 'Accounts' is the related object.

Reports display only records that meet the criteria defined in the report type. Out of the box, Salesforce provides a set of predefined standard report types. Don't see all the fields you want? You might need to create a custom report type.

For example, say Lincoln mentions Maria on Chatter to ask which cities have the most leads. Maria can find out by creating a leads report based on the Leads standard report type. But if Lincoln only wants Leads that have Activities, then the Leads standard report type doesn't quite do the trick, because it returns all Leads (both with and without Activities). This doesn't worry Maria, though! She knows that she can create a custom report type named Leads with Activities that uses Leads as the primary object and Activities as the related object, which only returns Leads with Activities. Then, all she has to do is create a report based on her new Leads with Activities report type.



Resources

- [Reports and Dashboards Overview](#)
- [Video Series: Get Started with Lightning Experience Reports and Dashboards](#)

1A dashboard is: _____

- ☐ A.A list of records that meet the criteria you define.
- ☐ B.A visual display of key metrics and trends for records in your org.
- ☐ C.A list of key tasks to be completed in your org.
- ☐ D.A view of your computer's memory usage.

2A report type determines: _____

- ☐ A.Which fields and records are available for use when creating a report.
- ☐ B.Who can access the report.
- ☐ C.The date range used for the report.
- ☐ D.The colors available in a dashboard.