1. Reports & Dashboards for Lightning Experience
2. Extend Your Reporting Strategy with AppExchange

Extend Your Reporting Strategy with AppExchange

Learning Objectives

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

- Find free reports and dashboards packages on AppExchange.
- Install a reports and dashboards package from AppExchange.
- Modify the reports and dashboards in the installed package.

Install an App from AppExchange

When you're building a report or dashboard, a common strategy is to clone an existing report and modify it to meet your needs. But where do you get sample reports and dashboards to modify? Maria, the admin over at Ursa Major Solar, looks no further than AppExchange!

On AppExchange, there are sample report and dashboard packages available from Salesforce Labs. These can be downloaded and installed into your sandbox or production environment. The packages are free and the reports and dashboards can all be cloned and modified to suit your specific needs.

Popular topics include:

- Salesforce Adoption Dashboards
- Salesforce CRM Dashboards
- Sales Activity Dashboards
- Clean Your Room! Dashboard
- Service & Support Dashboards
- Knowledge Base Dashboards and Reports
- Salesforce Chatter Dashboards
- Chatter Challenge Dashboard

Whether you're looking for Sales, Service, Activity, CRM, or adoption-related dashboards, there are sample reports and dashboards available for you.

Keep in mind that some apps contain tabs, fields, objects, and more. And there are governors and limits in Salesforce, which your org is subject to. Apps can either be managed or unmanaged, and your overall limits are affected in different ways depending on which type you choose. When you're installing any app, keep your limits in mind. You can learn more about this topic by viewing the AppExchange Installation Guide.

To install an app, log in to AppExchange, find the app you want, and click **Get it Now**. During the installation process, you'll need to make a few decisions.

Some of the key ones are:

- Where do I install—production or sandbox?
    - In general, an AppExchange best practice is to install first in a sandbox. With reports and dashboards, here are a few considerations:
        - Some of the packages come bundled with a handful of custom fields.
        - Reports, dashboards, folders, and custom fields all have names, which can conflict with existing names in your org.
        - Packages all come with report and/or dashboard folders.
    - Once you know what specifically you're installing, you can decide where you want to install it.

Note

You can preview all the components in the package during the installation process.

- Do you want to give permissions to admins only, all users, or specific profiles?
    - Who can have access to these reports, dashboards, folders, and in some cases, custom fields? This is an area where you want to do a bit of preplanning before you install, so you don't have to make updates to profiles and folder sharing settings after you install.

Once your installation is successful, you receive an email confirmation. Now you're ready to go!

Access Installed Packages

Here's how to find what you just installed.

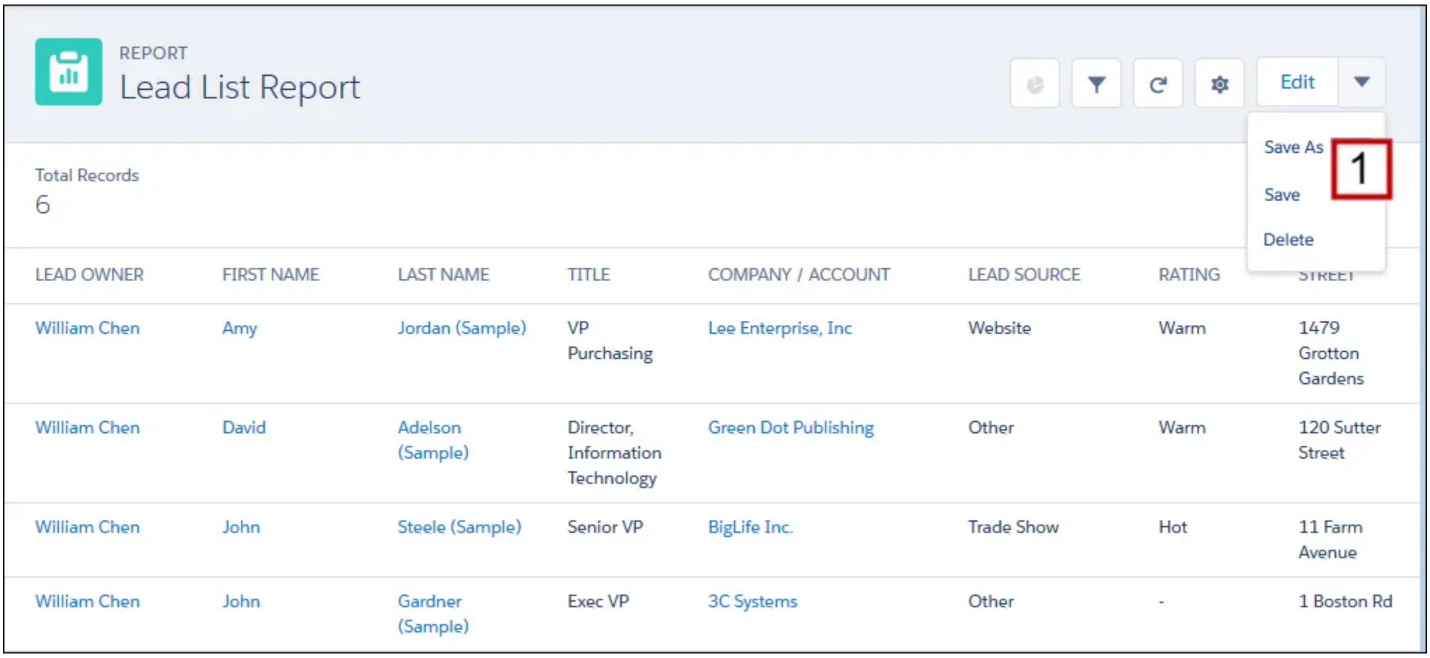
1. From Setup, enter `Installed Packages` in the Quick Find box, then select **Installed Packages**.
2. Click the name of your installed package. This will be the same name on the page where you downloaded the package from AppExchange.
3. Click **View Components**.
4. This opens the Package Details page, where you can see all the components, including reports, dashboards, folders, custom fields, and more. The easiest way to browse all the reports and dashboards is to view them from the Reports tab in Salesforce.

Now you can see all the reports and dashboards you just installed.

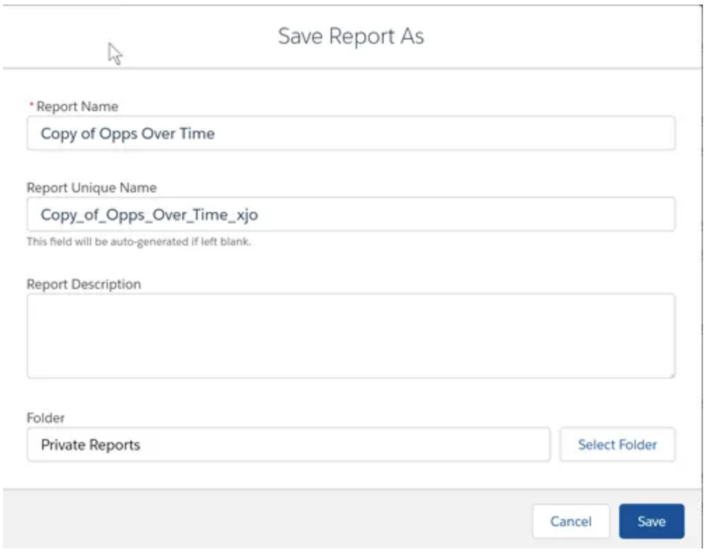
Modify Reports

The very first thing you need to remember when modifying an existing report is to make a copy. The last thing you want to do is mess up someone else's report!

To make a copy of a report, open it and click **Save As** [1].



Give your copied report a name, choose the **Private Reports** folder, and click **Save**. You can always move it to another report folder later, but this is a safe place to experiment with reports before you're ready to have others use them.



Now you can safely customize the report.

> **Tip**
>
> If you open an AppExchange report or dashboard with features that aren't supported in Lightning Experience, the unsupported features are suppressed but not removed. The feature won't appear in Lightning Experience, but if you open the report or dashboard in Salesforce Classic, then it'll be there. For more information, see Lightning Experience Limits.

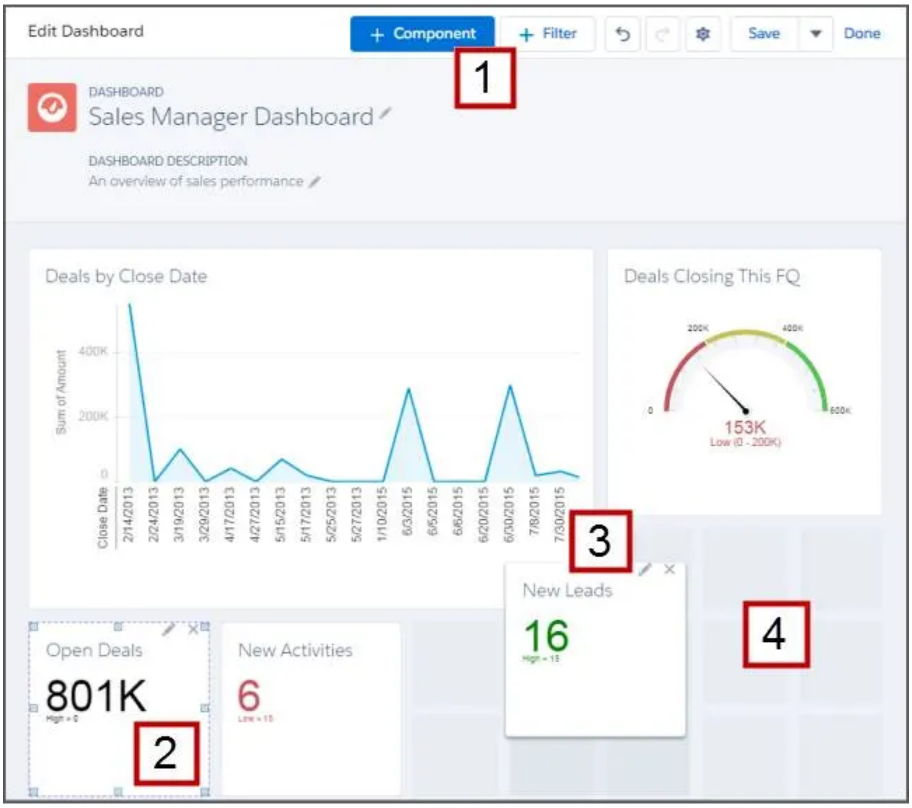
As you're getting started with modifying an existing report, try doing simple things like adding and removing columns, changing the column order, and changing the date range field and criteria. You can also add new filters and change the report format as you get more comfortable. As you make changes, remember to save often and click **Run Report** to see your finished result, as the preview pane only displays a limited set of records.

Modify Dashboards

As with reports, make sure you clone a copy so that you don't mess up someone else's dashboard!

To clone the dashboard, open it up, click the arrow to the right of the **Save** button and select **Save As**.

Enter a name, specify a folder, and click **Create**. Then click **Edit** to open the dashboard in edit mode in the drag-and-drop dashboard builder. Now you can see how the dashboard was initially created. Let's take a closer look.



Remember, you can add components and filters [1], change a component by clicking [2], drag and drop a component [3], and rearrange components [4].

As you're getting started with modifying dashboards, one of the best things to do is simply change dashboard component types. To this end, try taking a single report and building a dashboard with that same report displayed in each dashboard component type. This will give you a good sense of how each dashboard component type works.

Common Customizations

Now that you know how to install a report and dashboard package and you have assessed what's in the package, time to start making modifications! Remember to always use **Clone** before you get started.

Here are some common ways to customize an existing report or dashboard. Try them out!

- Add a date range
- Use a relative date value like TODAY, YESTERDAY, LAST WEEK, and LAST MONTH
- Group by owner
- Change dashboard component type
- Change order of columns
- Add or remove columns
- Change the report format to tabular, summary, or matrix
- Add additional dashboard components

Resources

- Displaying Installed Package Details
- Sample CRM Dashboards
- Getting Dashboards to Display the Right Data
- Salesforce CRM Dashboards
- Knowledge Base Dashboards and Reports
- Chatter Usage Dashboards
- Service & Support Dashboards
- Salesforce Adoption Dashboards
- Salesforce Communities Dashboards

Get Ready

You'll be completing this challenge in your own personal Salesforce environment. Choose from the dropdown menu, then click **Launch** to get started. If you use Trailhead in a language other than English, set the language of your Trailhead Playground to English before you attempt this challenge. Want to find out more about using hands-on orgs for Trailhead learning? Check out the Trailhead Playground Management module.

Your Challenge

Modify an AppExchange dashboard
Maria Jimenez is looking for reports and dashboards on AppExchange to track her team's transition to Lightning Experience. Install the AppExchange Dashboard Pack for Sales, Marketing and Service package into your Trailhead Playground and make some modifications.

You'll need your hands-on org username and password to complete this challenge. If you're using a Trailhead Playground, this article shows you how to find your username and reset your password. If you have trouble installing the package, follow the steps in this article.

- In your Trailhead Playground, install the AppExchange Dashboard Pack for Sales, Marketing and Service.
- Clone the 1-Account, Contact & Opportunity Data Quality dashboard and name it **My Account and Contact Dashboard**.
- Add a dashboard filter on the **Billing City** field so that the dashboard only shows info about Accounts in **London**.
- Save and refresh the dashboard.

My Trailhead Playground 3

Launch

Check challenge to earn 500 points