

# Salesforce Reports & Dashboard – Sales Performance Insights

## Project Overview

This project demonstrates my hands-on experience in **Salesforce Reports and Dashboards** to analyze sales performance, opportunity progress, and customer distribution.

The goal was to transform raw CRM data into **actionable business insights** through Salesforce's native reporting tools, applying advanced features such as **Matrix reports**, **Buckets**, **Joined reports**, and **Formulas**, and finally presenting the results in a **dynamic Lightning Dashboard**.

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## Objectives

- Design and build **custom Salesforce reports** to analyze Opportunities and Accounts.
  - Apply **advanced reporting techniques** (bucketing, grouping, conditional formulas).
  - Calculate **weighted opportunity values** and **percentages by stage** for sales analysis.
  - Combine multiple reports into a **dashboard** that tracks key KPIs and visual insights.
  - Demonstrate strong proficiency with **Salesforce analytics tools**.
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## Project Components

### 1. Reports Created

A variety of report formats were used to meet different analytical needs.

Report Type	Report Name	Key Purpose
Tabular Report	Open Cases for Accounts I Own	Display open case records for owned accounts
Summary Report	New Opportunities Report	Summarize opportunity values per sales stage
Matrix Report	Copy of New Accounts Report	Compare account types by billing country
Joined Report	Opportunity vs Account Insights	Combine Opportunity and Account data for joint analysis

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## 2. Key Techniques Implemented

### ◆ Buckets & Grouping

- Created **bucket fields** to categorize opportunities by stage (e.g., *Qualify*, *Propose*, *Closed Won*).
- Grouped data by **Created Date**, **Account Type**, and **Stage** to analyze trends and totals.

### ◆ Report Types: Tabular, Summary, Matrix

- **Tabular Reports:** Used for lists like open cases or raw data review.
- **Summary Reports:** Aggregated sums and averages for financial metrics.
- **Matrix Reports:** Cross-tab analysis (e.g., Account Type vs Billing Country).

### ◆ Matrix Buckets and Charts

- Created **matrix views** to analyze multiple dimensions simultaneously.
- Integrated **bar, gauge, and donut charts** for visualization.

### ◆ Percentage of Total Opportunities per Stage

- Used **summary formulas** to calculate what percentage each sales stage contributes to the total pipeline value.

### ◆ Weighted Opportunity Value

- Added a **row-level formula** to compute:

$$\text{Weighted Value} = \text{Amount} \times \frac{\text{Probability} (\%)}{100}$$

- This formula provided realistic revenue forecasting based on opportunity probability.

### ◆ Conditional Formatting & Row-Level Formulas

- Highlighted key performance metrics visually using **color-coded thresholds**.
- Created formulas such as *Is Meet & Present?* (boolean) to segment records dynamically.

### ◆ Joined Reports

- Combined data from multiple report types (Opportunities and Accounts) to correlate deal size, region, and account engagement.
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### 3. Dashboard Design

**Dashboard Name: Demo Dashboard**

**Dashboard Components:**

Component	Type	Data Source	Purpose
New Opportunities Report	Bar Chart	Opportunities	Display opportunity value per stage
Weighted Opportunity Value	Metric	Formula field	Show total weighted pipeline value
Open Cases for Accounts I Own	Horizontal Bar Chart	Cases	Track customer case status
New Accounts Report	Gauge Chart	Accounts	Visualize new account acquisition rate
Account Type by Country	Stacked Bar / Donut Report	Matrix Report	Show distribution of accounts globally

**Design Highlights:**

- Simple, color-coded layout for easy interpretation.
- Consistent color themes for each stage and metric.
- Each chart linked back to its respective report for drill-down analysis.

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### Sample Metrics and Outputs

From the reports (as shown in screenshots):

- **Total Opportunity Value:** \$193,000
  - **Weighted Opportunity Value:** Based on probability calculation, ~\$47,000
  - **Top Opportunity Stage:** *Meet & Present* (represents highest share of total value).
  - **Account Distribution:** Spread across countries including Bangladesh, India, and the USA.
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## Skills Demonstrated

Category	Skills
Salesforce Analytics	Report Builder, Dashboard Designer, Data Aggregation
Data Analysis	Grouping, Bucketing, KPI Measurement
Visualization	Chart Design, Conditional Formatting
Sales Intelligence	Pipeline Forecasting, Weighted Value Calculation
Technical	Joined Reports, Row-Level Formulas, Lightning Dashboard Setup

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## Tools & Environment

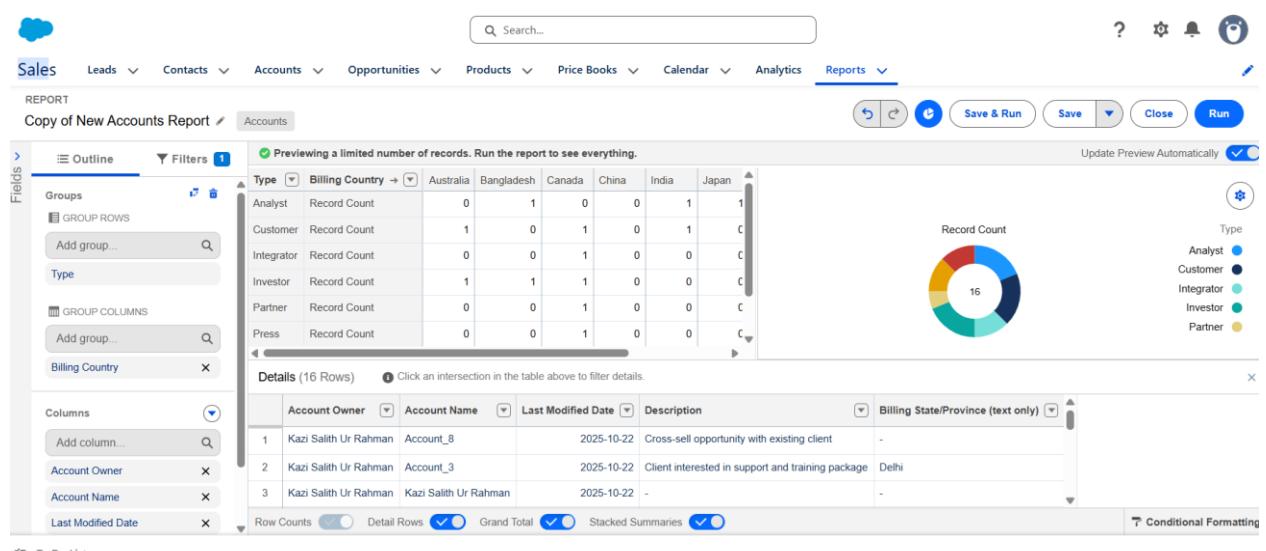
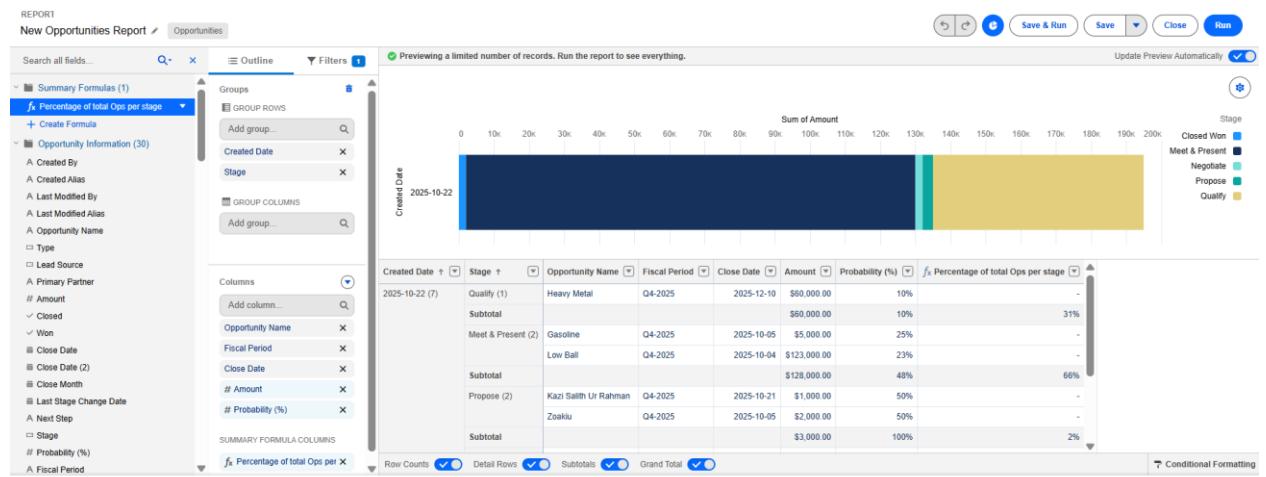
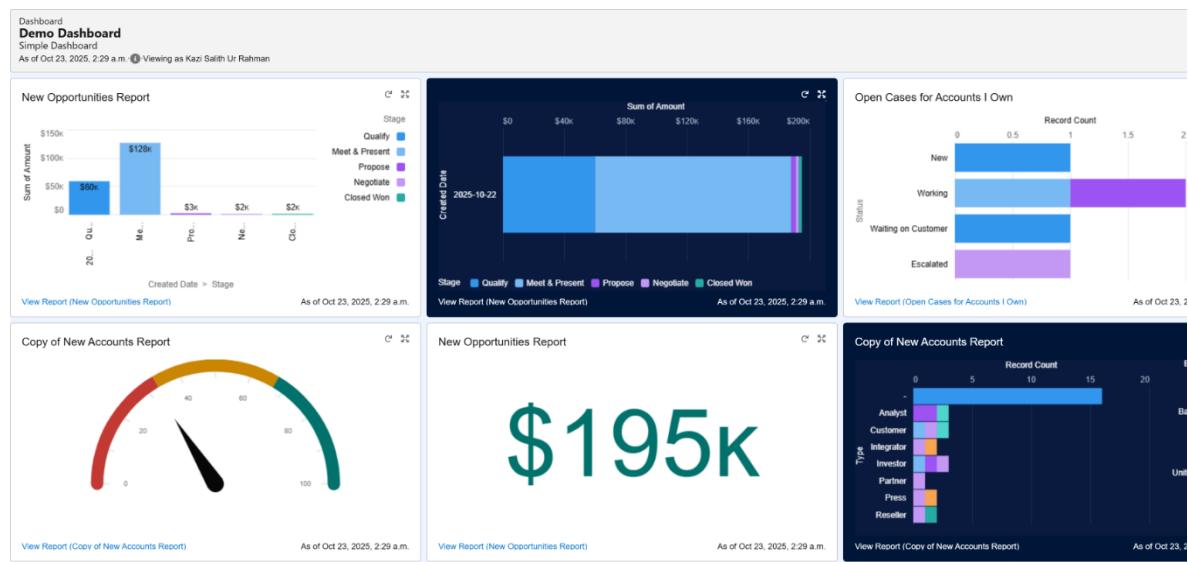
- **Platform:** Salesforce Lightning Experience
  - **Modules Used:** Reports, Dashboards, Opportunities, Accounts, Cases
  - **Techniques:** Bucketing, Grouping, Joined Reports, Row-level Formulas, Conditional Formatting
  - **Reporting Features:** Charts, Gauge, Donut, and Summary Metrics
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## Business Impact

This dashboard provides:

- Real-time visibility into sales pipeline health.
  - Quick access to account distribution and opportunity performance.
  - Data-driven insights for prioritizing opportunities.
  - Forecasting support via weighted opportunity metrics.
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## Screenshots



REPORT  
New Opportunities Report Opportunities

**Fields** Outline Filters 1 Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

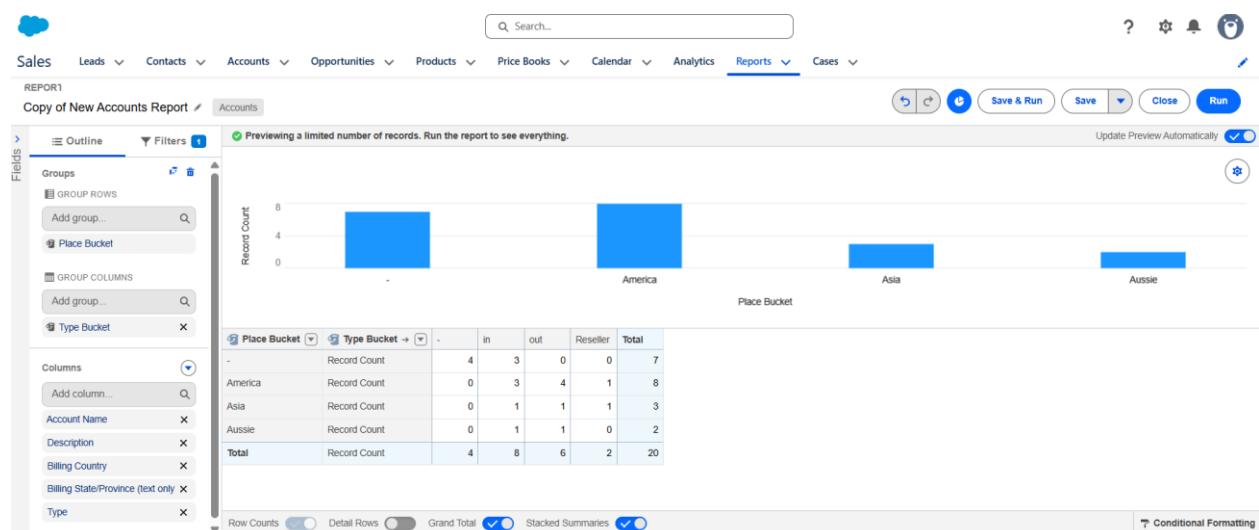
Opportunity Owner	Account Name	Opportunity Name	Stage	Close Date	Created Date	Amount	Probability (%)	Weighted Opportunity Value
Kazi Salith Ur Rahman	Account_6	Heavy Metal	Qualify	2025-12-10	2025-10-22	\$60,000.00	10%	6,000
Kazi Salith Ur Rahman	Account_20	Kazi Salith Ur Rahman	Propose	2025-10-21	2025-10-22	\$1,000.00	50%	500
Kazi Salith Ur Rahman	Account_6	Life Insurance	Closed Won	2025-11-04	2025-10-22	\$2,000.00	100%	2,000
Kazi Salith Ur Rahman	Account_19	Gasoline	Meet & Present	2025-10-05	2025-10-22	\$5,000.00	25%	1,250
Kazi Salith Ur Rahman	Account_20	Low Ball	Meet & Present	2025-10-04	2025-10-22	\$123,000.00	23%	28,290
Kazi Salith Ur Rahman	Account_17	Peky	Negotiate	2025-10-31	2025-10-22	\$2,000.00	75%	1,500
						\$193,000.00	283%	39,540

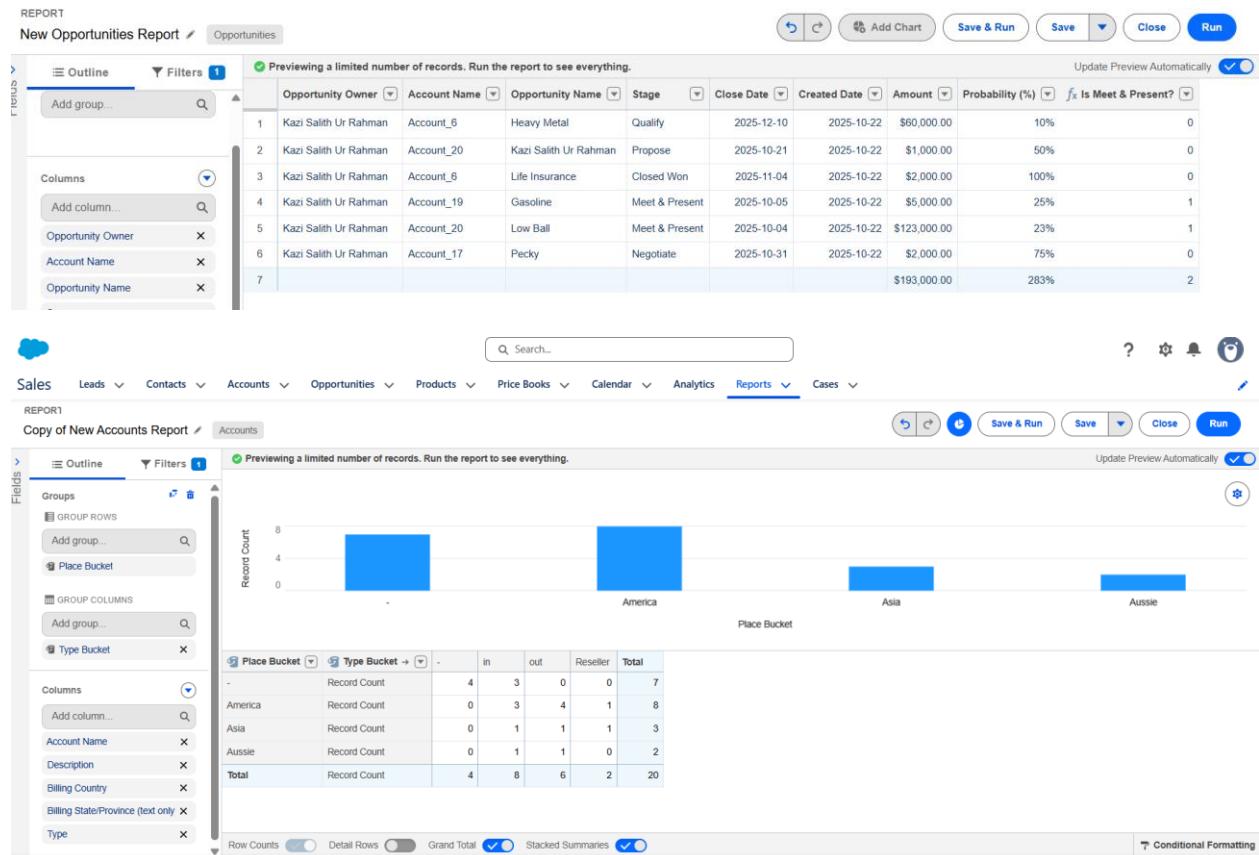
Sales Leads Contacts Accounts Opportunities Products Price Books Calendar Analytics Reports Cases

REPORT Copy of New Accounts Report Accounts

**Fields** Outline Filters 1 Previewing a limited number of records. Run the report to see everything.

Place Bucket	Type Bucket	Account Name	Description	Billing Country	Billing State/Province (text only)	Type	
America (8)	in (3)	Account_4	Partnership expansion discussion ongoing	Canada	Newfoundland and Labrador	Integrator	
		Account_12	Opportunity for upselling premium plan	Canada	British Columbia	Investor	
		Account_19	Renewal of annual subscription due next month	United States	Florida	Integrator	
out (4)		Account_9	Cross-sell opportunity with existing client	Canada	Ontario	Customer	
		Account_5	Customer requesting system customization	United States	California	Press	
		Account_17	Cross-sell opportunity with existing client	Canada	Nova Scotia	Press	
		Account_18	Proposal for advanced analytics integration	Canada	Manitoba	Partner	
Reseller (1)		Account_2	Client interested in support and training package	Canada	Quebec	Reseller	
		Subtotal					
Asia (3)	in (1)	Account_3	Client interested in support and training package	India	Delhi	Analyst	
		Subtotal					
	out (1)		Account_20	Renewal of annual subscription due next month	India	West Bengal	Customer
		Subtotal					
	Reseller (1)		Account_6	Customer requesting system customization	China	Beijing	Reseller
	Subtotal						
	Row Counts	Detail Rows	Subtotals	Grand Total			





## Future Enhancements

- Automate dashboard refresh on a scheduled basis.
- Integrate Salesforce data with external BI tools (e.g., Tableau, Power BI).
- Add role-based dashboards for Sales Reps, Managers, and Executives.
- Implement advanced KPIs (e.g., Win Rate %, Conversion Ratios).

## Author

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Github Repo: <https://github.com/sky7ark/Salesforce-Reports-and-Dashboard-Project>