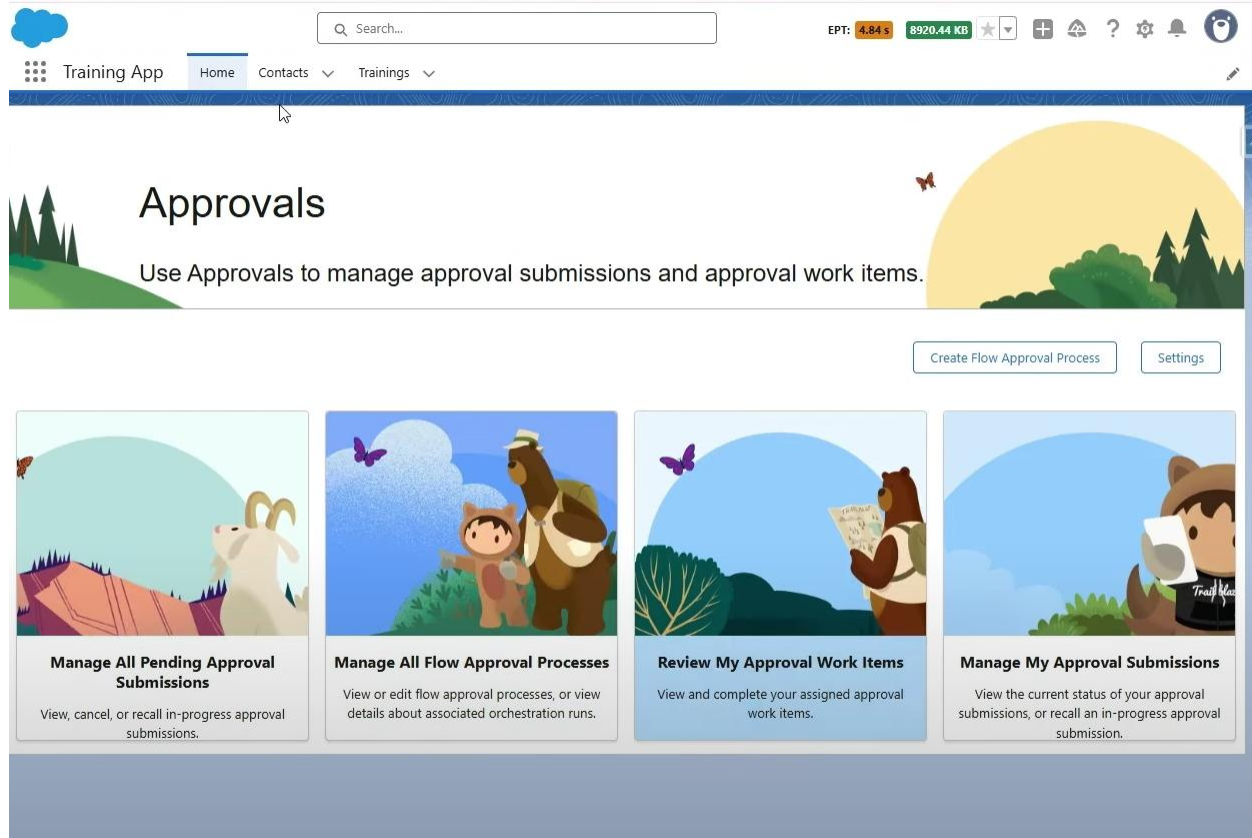


Phase 9 – Reporting Dashboards and Deployment

- Provide actionable insights from training data for decision-makers, auditors, managers, or HR teams.
- Visualize key metrics and statuses at a glance, for management and operational tracking.

Dashboard Tools

- Excel / Google Sheets:
 - Use tables, slicers, and charts
 - Best for simple dashboards
- Power BI / Tableau:
 - Advanced, real-time, interactive dashboards
 - Integrates with databases



Pre-Deployment Steps

1. Test the tracker:
 - Ensure correct reporting, data flow, and access control.
2. Clean sample data:
 - Include realistic entries for test users.
3. Set permissions:
 - Admins, Editors, Viewers, External access.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Training App

* Developer Name ⓘ
Training_App

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

TA Training App

Next

Mobile Builder for the Seller-Focused Experience	17	Sales	LightningSales	Manage your sales process with accounts,...	5/12/2025, 6:59 PM	Lightning	✓
	18	Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	5/12/2025, 6:59 PM	Lightning	✓

User Training

- Provide:
 - A quick-start guide or video tutorial
 - A short training session or helpdesk support
- Topics to cover:
 - How to access and update the tracker
 - How to interpret reports
 - Where to view dashboards
 - Reporting errors or issues

Setup Home Object Manager

New Lightning App

App Options

Navigation and Form Factor

*** Navigation Style**

☒ Standard navigation

☐ Console navigation

*** Supported Form Factors**

☒ Desktop and phone

☐ Desktop

☐ Phone

Setup and Personalization

Setup Experience

☒ Setup (full set of Setup options)

☐ Service Setup

App Personalization Settings

☐ Disable end user personalization of nav items in this app

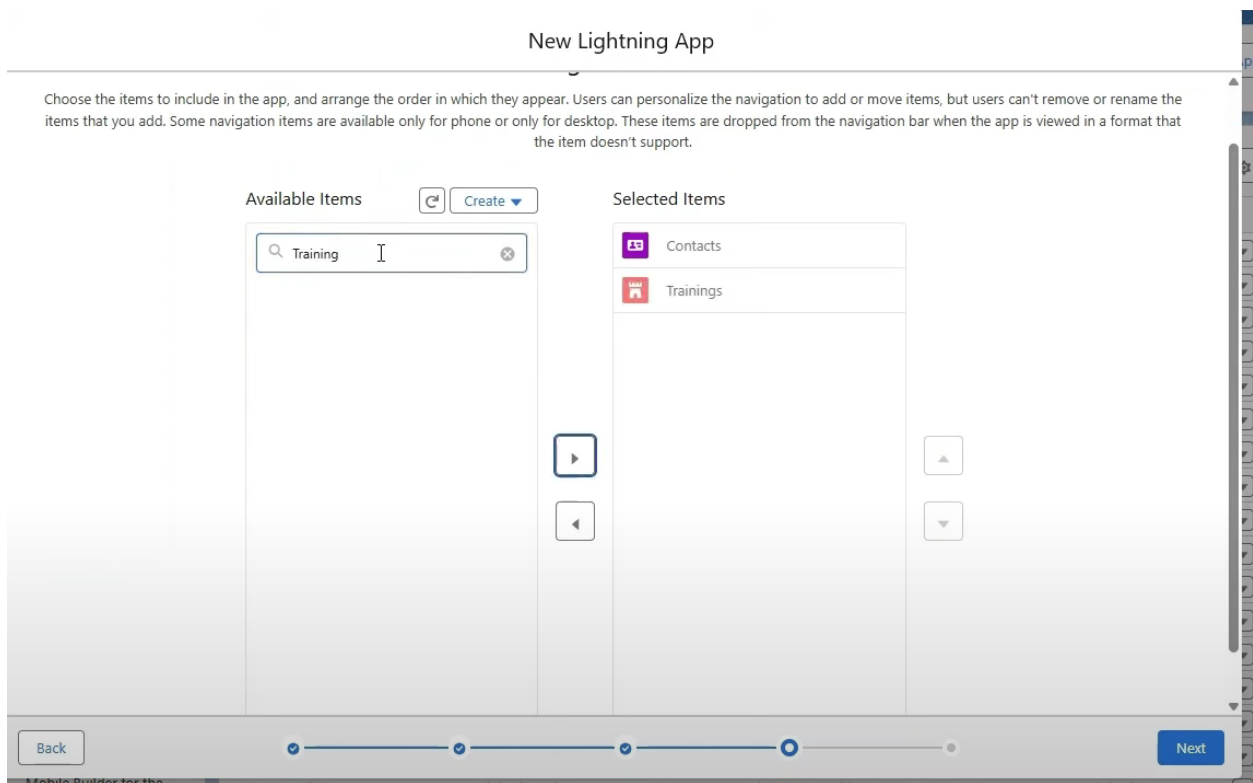
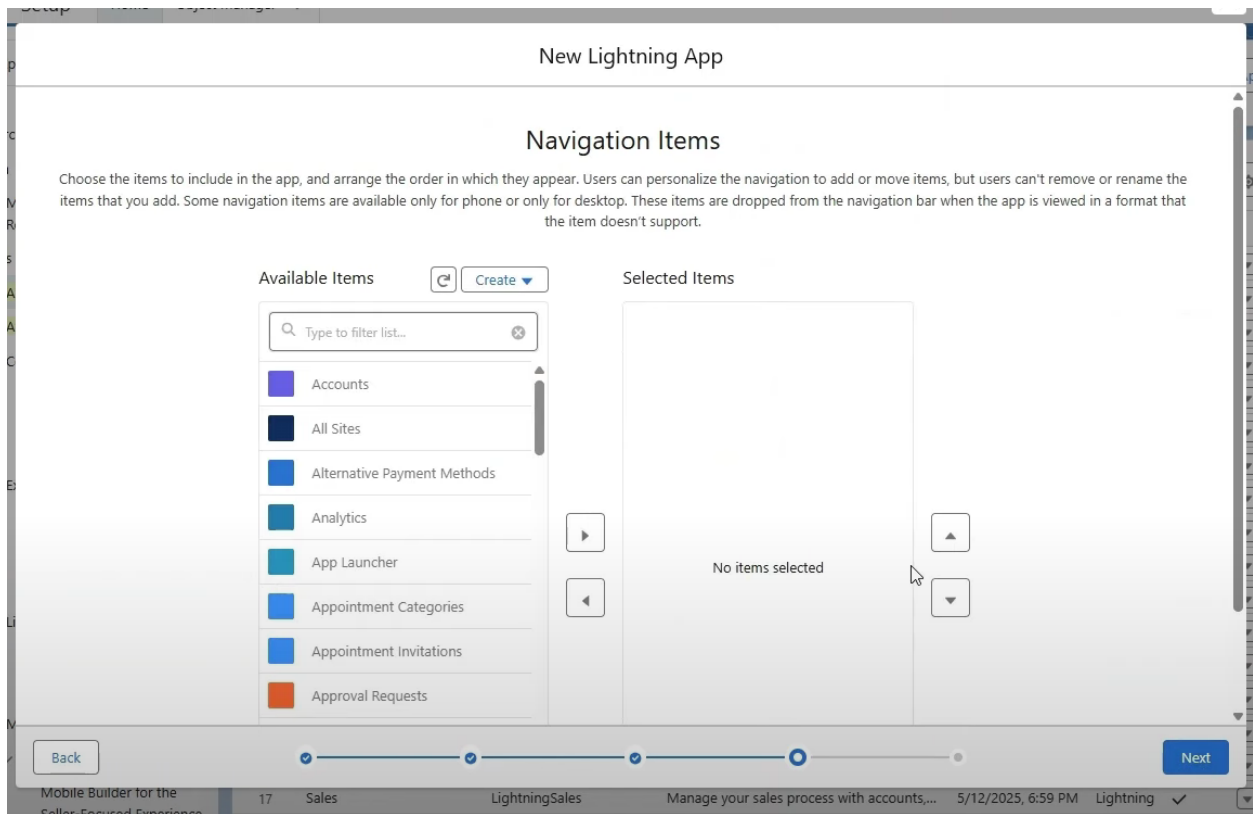
☐ Disable temporary tabs for items outside of this app

☐ Use Omni-Channel sidebar

Back

Next

Mobile Builder for the Seller-Focused Experience 17 Sales LightningSales Manage your sales process with accounts... 5/12/2025, 6:59 PM Lightning



New Lightning App

Choose the user profiles that can access this app.

Available Profiles

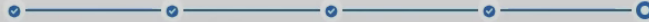
- Minimum Access - Salesforce
- Partner App Subscription User
- Partner Community Login User
- Partner Community User
- Read Only
- Salesforce API Only System Integrations
- Silver Partner User
- Solution Manager
- Standard Platform User
- Standard User

Selected Profiles

System Administrator



Back



Save & Finish