Assignment-5

REPORTS AND DASHBOARDS

1. There should be a report which should provide the number of accounts created of each type in last 60 days and also it should show the fields Bank Name, Branch Name, Account Name.
2. There should be a report which should display sum, average, max and min transaction amount for every account which are in public sector banks.
3. There should be a report which shows the Savings accounts having Initial Amount greater than 5000 and also have taken a Gold loan.
4. There should be a report which shows the information that which user has given how many loans of different types. For example Paul has given 5 Student loans and 3 Home Loans etc whereas Rock has given 8 Home Loans, 3 Car loans and 12 Student loans.
5. Schedule the report for all the users differently – Daily for Steve, weekly for Paul and monthly for Rock and the email should be sent to the manager for each report.
6. Make a report to show all account transactions per week, per month, per quarter, per FY and fiscal year should start at July and the first quarter should be July to September.
7. Make the suitable dashboards for all the reports.
8. Post a snapshot of a dashboard component to the dashboard feed.
9. Show all the dashboard components in Chatter feed.
10. Every user must view the dashboards according to his/her sharing and security settings.
11. Paul and rock should only have read access to these dashboards.
12. On clicking on any dashboard component it should be redirected to Salesforce home page.

Max Marks: 50