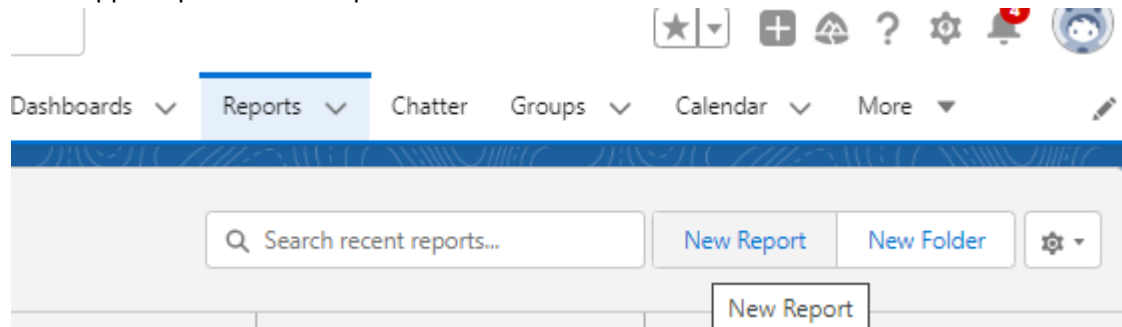


## Module 7 Assignment – Reports & Dashboards

### 1. Create a tabular report for the Leads object

Sales App> Reports> New Reposts

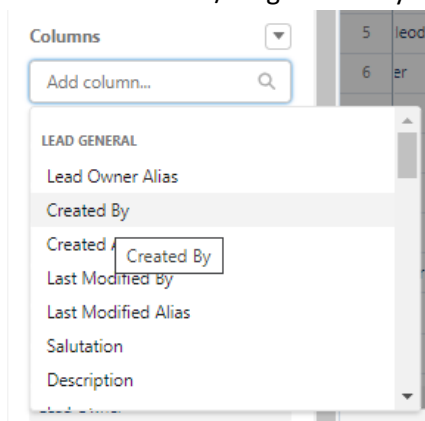


Filter > All

The screenshot shows the 'New Leads Report' page in the Salesforce Reports interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. Below the navigation bar is a search bar labeled 'Search...'. The 'Reports' tab is selected, and the 'New Leads Report' is being created. The 'Columns' section on the left lists various fields: First Name, Last Name, Title, Company / Account, Email, Lead Source, Street, Rating, and Lead Owner. The 'Table' section on the right displays a list of leads with columns: Name, Title, Company / Account, Email, Lead Source, Street, Rating, Lead Owner, and Created By. The 'Created By' column is highlighted with a red box.

Name	Title	Company / Account	Email	Lead Source	Street	Rating	Lead Owner	Created By
1	se	SVP, Procurement	Jackson Controls	jeffg@jackson.com	Phone Inquiry	-	Veena G	Veena G
2	id	VP, Technology	Metropolitan Health Services	likeb@metro.com	Purchased List	-	Veena G	Veena G
3	er	CEO	International Shipping Co.	patricia_feager@is.com	Partner Referral	-	Veena G	Veena G
4	re	CFO	Cardinal Inc.	brenda@cardinal.net	Web	-	Veena G	Veena G
5	lead	VP, Finance	Emerson Transport	violetm@emersontransport.com	Phone Inquiry	-	Veena G	Veena G
6	er	Regional General Manager	TNR Corp.	ksnyder@tnr.net	Purchased List	-	Veena G	Veena G
7	s	SVP, Production	Delphi Chemicals	tom.james@delphichemicals.com	Web	-	Veena G	Veena G
8	nell	SVP, Technology	Western Telecommunications Corp.	shellyb@westerntelecom.com	Partner Referral	-	Veena G	Veena G
9	tbody	SVP, Technology	Hendrickson Trading	pam_owenby@hendricksontrading.com	Partner Referral	-	Veena G	Veena G
10		VP, Facilities	Greenwich Media	norm_may@greenwich.net	Web	-	Veena G	Veena G
11	uller	SVP, Administration and Finance	Pyramid Construction Inc.	pat@pyramid.net	Phone Inquiry	-	Veena G	Veena G
12	g	SVP, Operations	Dickenson pic	a_young@dickenson.com	Purchased List	-	Veena G	Veena G
13		Director, Warehouse Mgmt	Aethna Home Products	kakin@athenahome.com	Partner Referral	-	Veena G	Veena G

Search and select/drag columns you wanted-



## Module 7 Assignment – Reports & Dashboards

### Adding 'created by' item in column Added-

Buttons: Add Chart, Save & Run, Save, Close, Run

Update Preview Automatically: ☐

	Lead Source	Street	Lead Owner	Created By
	Phone Inquiry	-	Veena G	Veena G
	Purchased List	-	Veena G	Veena G
	Partner Referral	-	Veena G	Veena G
	Web	-	Veena G	Veena G
tl.com	Phone Inquiry	-	Veena G	Veena G
	Purchased List	-	Veena G	Veena G
als.com	Web	-	Veena G	Veena G
om	Partner Referral	-	Veena G	Veena G
ntrading.com	Partner Referral	-	Veena G	Veena G
t	Web	-	Veena G	Veena G
	Phone Inquiry	-	Veena G	Veena G
	Purchased List	-	Veena G	Veena G
	Partner Referral	-	Veena G	Veena G

Current: INR

### Now- select format

Navigation: Sales, Home, Opportunities, Leads, Tasks

REPORT

Choose Format

- Report**  
Add columns and filters from a single report type.
- Joined Report**  
Add blocks of the same report type or different report types.

Buttons: Cancel, Apply

Fields: Last Name, 8, Brownell

### Save it in folder-

Search: Search...

Navigation: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter

Report "New Leads Report" was saved

### Result-

Report: Leads  
**New Leads Report**  
Case lead reports

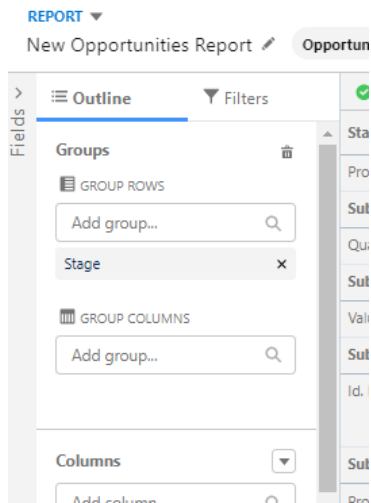
Buttons: Enable Field Editing, Add Chart, Edit

Total Records: 25

	First Name	Last Name	Title	Company / Account	Email	Lead Source	Street	Lead Owner	Created By
1	Jeff	Glimpse	SVP, Procurement	Jackson Controls	jeffg@jackson.com	Phone Inquiry	-	Veena G	Veena G
2	Mike	Braund	VP, Technology	Metropolitan Health Services	likeb@metro.com	Purchased List	-	Veena G	Veena G
3	Patricia	Feager	CEO	International Shipping Co.	patricia_feager@is.com	Partner Referral	-	Veena G	Veena G
4	Brenda	Mcclure	CFO	Cadinal Inc.	brenda@cardinal.net	Web	-	Veena G	Veena G
5	Violet	Macleod	VP, Finance	Emerson Transport	violetm@emersontransport.com	Phone Inquiry	-	Veena G	Veena G
6	Kathy	Snyder	Regional General Manager	TNR Corp.	ksnyder@tnr.net	Purchased List	-	Veena G	Veena G
7	Tom	James	SVP, Production	Delphi Chemicals	tomjames@delphi.chemicals.com	Web	-	Veena G	Veena G
8	Shelly	Brownell	SVP, Technology	Western Telecommunications Corp.	shellyb@westerntelecom.com	Partner Referral	-	Veena G	Veena G
9	Pamela	Owenby	SVP, Technology	Hendrickson Trading	pam_owenby@hendricksontrading.com	Partner Referral	-	Veena G	Veena G
10	Norm	May	VP, Facilities	Greenwich Media	norm_may@greenwich.net	Web	-	Veena G	Veena G
11	Pat	Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.	pat@pyramid.net	Phone Inquiry	-	Veena G	Veena G
12	Andy	Young	SVP, Operations	Dickenson plc	a_young@dickenson.com	Purchased List	-	Veena G	Veena G

## Module 7 Assignment – Reports & Dashboards

2. Create a summary report for the Opportunity object using the average function
  - Go to reports > New report> object 'opportunity ' Add 'Stage' in group rows



### Result-

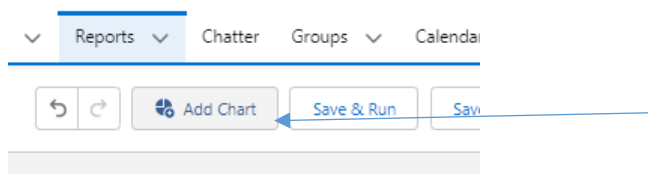
Opportunities

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically ☒

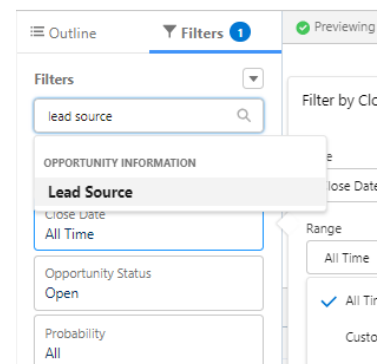
Stage	Owner Role	Opportunity Owner	Account Name	Opportunity Name	Amount	Expected Revenue	Probability (%)	Age
Prospecting (1)	CEO	Veena G	Pyramid Construction Inc.	Pyramid Emergency Generators	INR 100,000.00	INR 10,000.00	10%	
Subtotal								
Qualification (1)	CEO	Veena G	Dickenson plc	Dickenson Mobile Generators	INR 15,000.00	INR 1,500.00	10%	
Subtotal								
Value Proposition (1)	CEO	Veena G	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	INR 250,000.00	INR 125,000.00	50%	
Subtotal								
Id. Decision Makers (2)	CEO	Veena G	Edge Communications	Edge Emergency Generator	INR 35,000.00	INR 21,000.00	60%	
	CEO	Veena G	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	INR 15,000.00	INR 9,000.00	60%	
Subtotal								
Proposal/Price Quote (1)	CEO	Veena G	United Oil & Gas Corp.	United Oil Refinery Generators	INR 270,000.00	INR 202,500.00	75%	
Subtotal								
Negotiation/Review (2)	CEO	Veena G	United Oil & Gas Corp.	United Oil Office Portable Generators	INR 125,000.00	INR 112,500.00	90%	
	CEO	Veena G	United Oil & Gas Corp.	United Oil Installations	INR 270,000.00	INR 243,000.00	90%	
Subtotal								

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Currency: INR

Click > Add Charts



Change the graph to Line> click Filter > Opportunity status-‘Open’  
Add new filter –‘Lead Source’



## Module 7 Assignment – Reports & Dashboards

As we need leads generated from web-

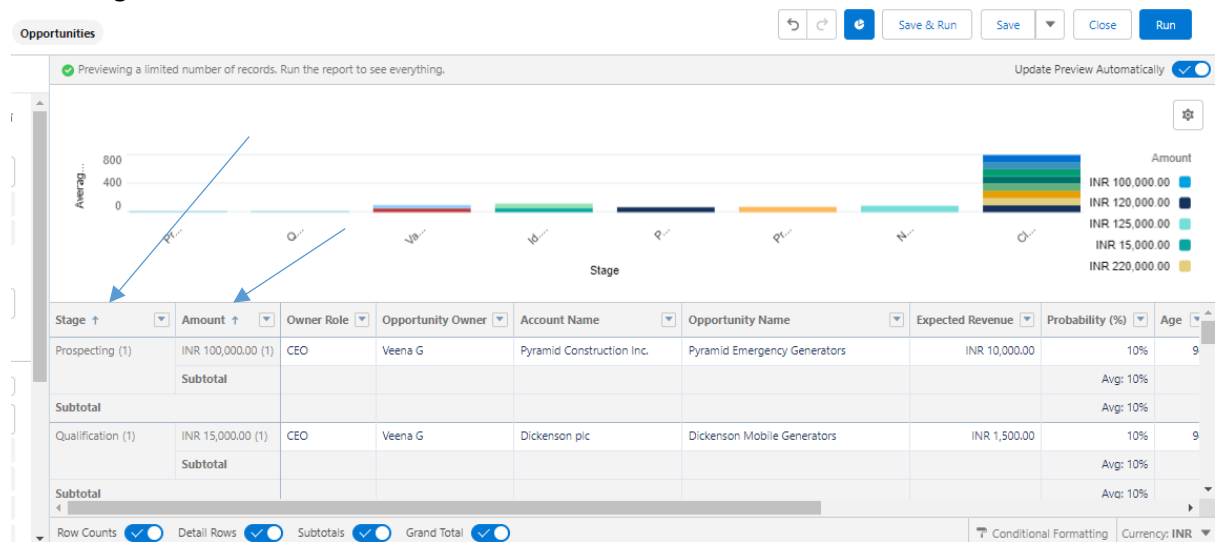
The screenshot shows a filter criteria list on the left with 'Lead Source equals Web' selected. On the right, the 'Filter by Lead Source' dialog is open, showing 'Operator' as 'equals' and 'Value' as 'Web'. A 'Show Selected (1)' link is visible next to the value field.

Result-

The screenshot shows a report table with columns: Probability (%), Age, Close Date, and Created Date. A context menu is open over the 'Probability (%)' column, showing options like 'Sort Ascending', 'Sort Descending', 'Group Rows by This Field', 'Group Columns by This Field', 'Summarize', 'Bucket This Column', 'Show Unique Values', 'Average', 'Max', 'Min', 'Median', 'Move Left', 'Move Right', and 'Remove Columns'.

3. Create a matrix report for the Opportunity object with dimensions as Stage and Amount
- Ans-

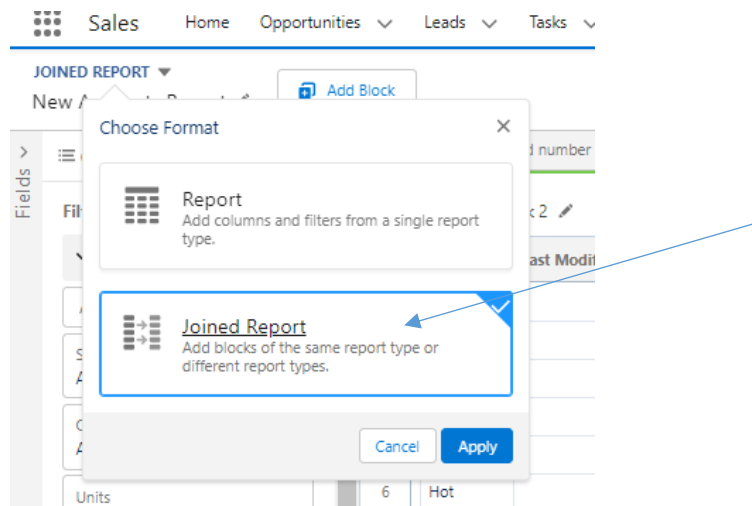
With Stage and amount



## Module 7 Assignment – Reports & Dashboards

4. Create a joined report for Cases, Accounts, and Opportunity objects  
Ans- Go to Reports> New reports > select Account object>

In report type select- 'Joined Report'



Add all necessary items and run-

Joined report of Account, Case and Opportunity

Joined Report: New Accounts Report														
Cases block 1										Accounts Accounts block 2				
Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating		
1	Veena G	-	-	10/5/2023, 3:36 PM	26			-	Veena G	United Oil & Gas Corp.	NY	Customer - Direct	Hot	
2	Veena G	Case assignment	-	10/5/2023, 3:57 PM	26			-	Veena G	iForce	CA	-	-	
3	Veena G	Edge Communications	Starting generator after electrical failure	7/4/2023, 7:52 AM	-9:43			-	Veena G	GenePoint	CA	Customer - Channel	Cold	
4	Veena G	United Oil & Gas Corp.	Performance inadequate for second consecutive week	7/4/2023, 7:52 AM	-9:43			-	Veena G	United Oil & Gas, UK	UK	Customer - Direct	-	
5	Veena G	United Oil & Gas Corp.	Seeking guidance on electrical wiring installation for GC5080	7/4/2023, 7:52 AM	2:26			-	Veena G	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	
6	Veena G	Express Logistics and Transport	Easy installation process	7/4/2023, 7:52 AM	-9:43			-	Veena G	Edge Communications	TX	Customer - Direct	Hot	
7	Veena G	Express Logistics and Transport	Maintenance guidelines for generator unclear	7/4/2023, 7:52 AM	-9:43			-	Veena G	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	
8	Veena G	Express Logistics and Transport	Electrical circuit malfunctioning	7/4/2023, 7:52 AM	-9:43			-	Veena G	Pyramid Construction Inc.	-	Customer - Channel	-	
9	Veena G	GenePoint	Generator assembly instructions unclear	7/4/2023, 7:52 AM	-9:43			-	Veena G	Dickenson plc	KS	Customer - Channel	-	
10	Veena G	Grand Hotels & Resorts Ltd	Structural breakdown of rotor assembly	7/4/2023, 7:52 AM	-9:43			-	Veena G	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	
11	Veena G	Grand Hotels & Resorts Ltd	Customer service for portable generators needs beefing up	7/4/2023, 7:52 AM	-9:43			-	Veena G	Express Logistics and Transport	OR	Customer - Channel	Cold	
12	Veena G	United Oil & Gas, UK	Mechanical maintenance guidelines for generator misleading	7/4/2023, 7:52 AM	-9:43			-	Veena G	University of Arizona	AZ	Customer - Direct	Warm	
13	Veena G	United Oil & Gas, Singapore	Maintenance guidelines for generator unclear	7/4/2023, 7:52 AM	-9:43			-	Veena G	Case assignment	-	-	Warm	
14	Veena G	United Oil & Gas, Singapore	Electronic panel fitting loose	7/4/2023, 7:52 AM	-9:43			-	Automated Process	Sample Account for Entitlements	-	-	-	
15	Veena G	University of Arizona	Repeated motor breakdown while shutting off	7/4/2023, 7:52 AM	-9:43									
16	Veena G	Grand Hotels & Resorts Ltd	Starting up generator consumes excessive power	7/4/2023, 7:52 AM	-9:43									
17	Veena G	Grand Hotels & Resorts Ltd	Delay in installation, spare parts unavailable	7/4/2023, 7:52 AM	-9:43									

Joined Report: New Accounts Report														
Accounts Accounts block 2					Opportunities Opportunities block 1									
Type	Rating	Last Modified Date	Owner Role	Opportunity Owner	Account Name	Opportunity Name	Stage	Amount	Expected Revenue	Probability (%)	Age	Close Date	Created Date	Ne
mer - Direct	Hot	7/4/2023	CEO	Veena G	Dickenson plc	Dickenson Mobile Generators	Qualification	INR 15,000.00	INR 1,500.00	10%	94	5/12/2023	7/4/2023	-
2	-	7/4/2023	CEO	Veena G	United Oil & Gas Corp.	United Oil Office Portable Generators	Negotiation/Review	INR 125,000.00	INR 112,500.00	90%	94	4/30/2023	7/4/2023	-
mer - Channel	Cold	7/4/2023	CEO	Veena G	Express Logistics and Transport	Express Logistics Standby Generator	Closed Won	INR 220,000.00	INR 220,000.00	100%	0	3/26/2023	7/4/2023	-
mer - Direct	-	7/4/2023	CEO	Veena G	GenePoint	GenePoint Standby Generator	Closed Won	INR 85,000.00	INR 85,000.00	100%	0	5/3/2023	7/4/2023	-
mer - Direct	-	7/4/2023	CEO	Veena G	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	INR 15,000.00	INR 9,000.00	60%	94	3/21/2023	7/4/2023	-
mer - Direct	Hot	7/4/2023	CEO	Veena G	United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	INR 270,000.00	INR 202,500.00	75%	94	6/14/2023	7/4/2023	-
mer - Direct	Warm	7/4/2023	CEO	Veena G	United Oil & Gas Corp.	United Oil SLA	Closed Won	INR 120,000.00	INR 120,000.00	100%	0	6/21/2023	7/4/2023	-
mer - Channel	-	7/4/2023	CEO	Veena G	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	INR 250,000.00	INR 125,000.00	50%	94	6/29/2023	7/4/2023	-
mer - Channel	-	7/4/2023	CEO	Veena G	Edge Communications	Edge Emergency Generator	Closed Won	INR 75,000.00	INR 75,000.00	100%	0	6/29/2023	7/4/2023	-
mer - Direct	Warm	7/4/2023	CEO	Veena G	University of Arizona	University of AZ Portable Generators	Closed Won	INR 50,000.00	INR 50,000.00	100%	0	3/30/2023	7/4/2023	-
mer - Channel	Cold	7/4/2023	CEO	Veena G	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	INR 100,000.00	INR 10,000.00	10%	94	5/8/2023	7/4/2023	-
mer - Direct	Warm	7/4/2023	CEO	Veena G	Express Logistics and Transport	Express Logistics Portable Truck Generators	Value Proposition	INR 80,000.00	INR 40,000.00	50%	94	3/24/2023	7/4/2023	-
13	Warm	10/5/2023	CEO	Veena G	GenePoint	GenePoint Lab Generators	Id. Decision Makers	INR 60,000.00	INR 36,000.00	60%	94	6/23/2023	7/4/2023	-
14	-	7/4/2023	CEO	Veena G	Express Logistics and Transport	Express Logistics SLA	Perception Analysis	INR 120,000.00	INR 84,000.00	70%	94	3/25/2023	7/4/2023	-
15			CEO	Veena G	University of Arizona	University of AZ SLA	Closed Won	INR 90,000.00	INR 90,000.00	100%	0	4/3/2023	7/4/2023	-
16			CEO	Veena G	Burlington Textiles Corp of America	Burlington Textiles Weaving Plant Generator	Closed Won	INR 235,000.00	INR 235,000.00	100%	0	5/5/2023	7/4/2023	-
17			CEO	Veena G	United Oil & Gas Corp.	United Oil Installations	Closed Won	INR 235,000.00	INR 235,000.00	100%	0	5/7/2023	7/4/2023	-

5. Create a custom report type named Opportunity with the primary object as Opportunity, the secondary object as Cases, and the tertiary object as Email. Then, create a tabular report for the custom report type

Ans-

**Report Types**

Custom Report Type: **Opportunity**

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

**Custom Report Type Definition** [Edit](#) [Delete](#) [Clone](#)

Report Type Label	Opportunity	Report Type Category	Leads
Report Type Name	Opportunity	Deployment Status	Deployed
Description	NA		
Created By	Vaana G. 10/9/2023, 7:47 PM	Modified By	Vaana G. 10/9/2023, 7:47 PM

**Object Relationships** [Edit](#) [Object Relationships Help](#)

Opportunities (A)

- with at least one related record from Partners (B)
- with at least one related record from Cases (C)
- with at least one related record from Emails (D)

**Fields Available for Reports** [Edit Layout](#) [Preview Layout](#) [Fields Available for Reports Help](#)