

# Creating Dashboards In Salesforce

**Salesforce: Dashboards** Christopher Matthew Spencer 2017

Salesforce Reporting and Dashboards Johan Yu 2015-03-26 Key Features Book Description This book is intended for all Salesforce users—administrators, managers, business analysts, or report writers who are new to creating reports or dashboards within Salesforce. Basic knowledge of the Salesforce platform is required. What you will learn Understand and create multiple types of reports and dashboards from scratch Assign permissions related to reports and dashboards Get to grips with the Salesforce data architecture and its relation to reports Get to know what a report folder is and how to use it Understand and create custom report types from scratch Use various components related to basic and advanced report configuration Discover best practices to build and share reports and dashboards Interface your dashboard to your mobile device app on the go Who this book is for This book is intended for all Salesforce users administrators, managers, business analysts, or report writers who are new to creating reports or dashboards within Salesforce. Basic knowledge of the Salesforce platform is required.

**Mastering Salesforce Reports and Dashboards** David Carnes 2023-06-14 Effective, repeatable, and insightful analytics are key to ROI in customer relationship management systems. Many organizations, however, lack the automated reporting tools they need to run their businesses and instead choose to massage the data in Excel. But there's a better way. Salesforce's standard reporting tools provide a rich set of features that, when combined, support a wide variety of analytics needs. This practical introduction covers all the aspects and features you need to be successful with Salesforce reports and dashboards. Author David Carnes, chairman and chief evangelist for OpFocus, shows executives, end users, and report and dashboard superusers what analytics are possible, which features report writers should ask to be enabled, and which settings and permissions system administrators need to activate. You'll learn: How to create reports using the four main report formats in Salesforce How to create and use dashboards Methods for storing and finding reports and dashboards How to leverage formulas and trending in Salesforce reporting Special reporting features only available in Salesforce Mobile and on the Analytics tab Ways to embed report charts and dashboards in Lightning page layouts Powerful combinations of reporting features to drive decisions

*Salesforce.com Secrets of Success* David Taber 2013-11-01 New Tools and Best Practices for Driving More Sales and Profits with Salesforce.com From Chatter to the Service Cloud, Salesforce.com now offers unprecedented opportunities to supercharge business performance. But most SFDC customers won't achieve that potential. Salesforce.com® Secrets of Success, Second Edition, is the one guide that will help you transform these opportunities into profit. Drawing on his personal experience with more than a hundred deployments, David Taber guides you through every aspect of Salesforce.com planning, implementation, and management. Building on a first edition that earned rave reviews, Taber focuses on the most valuable innovations in Salesforce.com's most recent releases. Reflecting all that's been learned about making Salesforce.com work, Taber offers results-focused best practices for sales, marketing, customer service, finance, legal, IT, and beyond. You'll find indispensable new insights into accelerating user adoption, achieving stronger operational results, and overcoming today's key obstacles to maximizing the value of Salesforce.com. New coverage in this revised edition includes Using the Service Cloud to cut costs, accelerate time to revenue, improve agility, and maximize customer lifetime value Leveraging tablets and smartphones to build your CRM strategy Identifying prospects and delighting customers through Salesforce.com's Social CRM capabilities Promoting more effective internal and external collaboration with Chatter Identifying best practices for going "all Cloud"—and managing the attendant risks Establishing realistic "hard" and "soft" metrics for everything from productivity and profitability to social CRM performance Discovering today's most valuable third-party AppExchange products Together with its companion website (SFDC-secrets.com), this new edition offers updated questionnaires, worksheets, templates, checklists, and other resources for every executive, team member, developer, and stakeholder.

**Salesforce for Beginners** Sharif Shaalan 2020-05-29 Get a 360-degree view of the Salesforce platform and learn how to use it for sales, service, marketing, and automating business processes. Key Features Understand how to use core Salesforce objects for maximum efficiency Build various dashboards and reports to analyze results and improve visibility in your business processes Learn the basics of Salesforce administration and mobile app set up Book Description Salesforce is the world's leading Customer Relationship Management (CRM) software, helping businesses connect with their constituents and partners. This book will give you a comprehensive introduction to managing sales, marketing, customer relationships, and overall administration for your organization. You'll learn how to configure and use Salesforce for maximum efficiency and return on investment. You'll start by learning how to create activities, manage leads, and develop your prospects and sales pipeline using opportunities and accounts, and then understand how you can enhance marketing activities using campaigns. Packed with real-world business use cases, this Salesforce book will show you how to analyze your business information accurately to make productive decisions. As you advance, you'll get to grips with building various reports and dashboards in Salesforce to derive valuable business insights. Finally, you'll explore tools such as process builder, approval processes, and assignment rules to achieve business process automation and set out on the path to becoming a successful Salesforce Administrator. By the end of the book, you'll have learned how to use Salesforce effectively to achieve your business goals. What you will learn Understand the difference between Salesforce Lightning and Salesforce Classic Create and manage leads in Salesforce Explore business development with accounts and contacts in Salesforce Find out how stages and sales processes help you manage your opportunity pipeline Achieve marketing goals using Salesforce campaigns Perform business analysis using reports and dashboards Gain a high-level overview of the items in the administration section Grasp the different aspects needed to build an effective and flexible Salesforce security model Who this book is for If you're new to Salesforce and want to learn it from scratch, this book is for you. No prior knowledge of Salesforce is required to get started with this book.

**Getting Started with Salesforce CRM Analytics** Johan Yu 2024-10-17 Dive into the intricate world of Salesforce CRM Analytics and harness the power of interactive and complex dashboards. This book will empower you to unlock the full potential of Salesforce CRM Analytics and enhance your ability to generate meaningful insights for strategic decision-making. Developed by Salesforce to transcend the limitations of standard reports and dashboards, CRM Analytics introduces a new platform that requires a fresh perspective for those familiar with the traditional Salesforce platform. Using a hands-on approach, this step-by-step book unravels the complexities of CRM Analytics, guiding you through the process of acquiring data from the Salesforce platform, importing external data like CSV files, and preparing the data for dashboard creation. You'll also learn to build dashboards from scratch, explore lenses, and delve into the depths of SAQL (Salesforce Analytics Query Language) and binding. CRM Analytics has a steeper learning curve than standard Salesforce reporting. Getting Started with Salesforce CRM Analytics will guide you through the journey of constructing dashboards, from data preparation to the final dashboard creation. What You Will Learn Understand CRM Analytics as a platform, including permission and licensing Get data into the CRM Analytics platform and transform data loaded Build dashboards using CRM Analytics Explore and analyze data using CRM Analytics Utilize SAQL and binding to create advance dashboards Who This Book Is For IT users getting started with CRM Analytics, Salesforce consultants starting new CRM Analytics projects, and power users familiar with Salesforce reporting and dashboards who want to get up to speed on advanced analytics features.

Business Week 2004

Introduction to Salesforce Analytics - Building Reports and Dashboards Steve Wasula 2012-07-01 This book is designed to accompany the Introduction to Salesforce Analytics - Building Reports and Dashboards class offered by Stony Point. A person reading this book or a student in this class will to build reports and dashboards utilizing basic and advanced concepts . Although the book is designed as a supplement to the

class, it contains valuable exercises that will be useful for someone wishing to learn on their own. This online, five hour class is delivered by a live instructor and is specifically designed to teach administrators, business analysts or report writers how to utilize the basic and advanced analytic capabilities of Salesforce. A student in this class or reading this workbook will learn the basic Salesforce object model, and how to create and secure reports and dashboards. The instructor will lead students through exercises to create tabular, summary, matrix and join reports. Students will learn advanced reporting functionality such as charting, report summary fields, bucket fields, conditional highlighting, advanced report filters and building custom report types. Finally, the student will learn how to create and run dashboards and schedule and email reports and dashboards. Each student will be given a practice learning environment to participate in hands-on exercises during the class. The student will be able to use that learning environment indefinitely after the class without any additional fee. Stony Point is a leading provider of Salesforce training for sales people, customer service personnel, marketers, system administrators, developers and consultants. Stony Point delivers public and private classes virtually and in-person at locations throughout the world. Please visit [www.stonyp.com](http://www.stonyp.com) for more information on the classes and services offered.

**Pro Power BI Desktop** Adam Aspin 2020-06-11 Deliver eye-catching and insightful business intelligence with Microsoft Power BI Desktop. This new edition has been updated to cover all the latest features of Microsoft's continually evolving visualization product. New in this edition is help with storytelling—adapted to PCs, tablets, and smartphones—and the building of a data narrative. You will find coverage of templates and JSON style sheets, data model annotations, and the use of composite data sources. Also provided is an introduction to incorporating Python visuals and the much awaited Decomposition Tree visual. Pro Power BI Desktop shows you how to use source data to produce stunning dashboards and compelling reports that you mold into a data narrative to seize your audience's attention. Slice and dice the data with remarkable ease and then add metrics and KPIs to project the insights that create your competitive advantage. Convert raw data into clear, accurate, and interactive information with Microsoft's free self-service BI tool. This book shows you how to choose from a wide range of built-in and third-party visualization types so that your message is always enhanced. You will be able to deliver those results on PCs, tablets, and smartphones, as well as share results via the cloud. The book helps you save time by preparing the underlying data correctly without needing an IT department to prepare it for you. What You Will Learn Deliver attention-grabbing information, turning data into insight Find new insights as you chop and tweak your data as never before Build a data narrative through interactive reports with drill-through and cross-page slicing Mash up data from multiple sources into a cleansed and coherent data model Build interdependent charts, maps, and tables to deliver visually stunning information Create dashboards that help in monitoring key performance indicators of your business Adapt delivery to mobile devices such as phones and tablets Who This Book Is For Power users who are ready to step up to the big leagues by going beyond what Microsoft Excel by itself can offer. The book also is for line-of-business managers who are starved for actionable data needed to make decisions about their business. And the book is for BI analysts looking for an easy-to-use tool to analyze data and share results with C-suite colleagues they support.

**Salesforce Sensei** Julia Kleszcz 2024-11-30 Dive into the art of creating dashboards that don't just display data but tell compelling stories. Salesforce Sensei: Mastering Dashboard Building is your ultimate guide to transforming raw metrics into actionable insights that drive results. Whether you're a seasoned admin or just starting your Salesforce journey, this guide unpacks the secrets to designing dynamic dashboards that captivate stakeholders and empower decision-making. With hands-on tips, real-world examples, and pro-level strategies, you'll learn to build dashboards that are as functional as they are visually stunning. Ready to elevate your Salesforce game? This book is your fast track to dashboard mastery.

**MicroStrategy Analytics Express User Guide** MicroStrategy Product Manuals 2013-10-31 The Express User Guide provides instructions to get started with MicroStrategy Express. It includes an introduction to dashboard analysis, creation, sharing, and management, as well as creating and managing users and teams.

**Hands-on Splunk on AWS** Jit Sinha 2024-12-30 DESCRIPTION Hands-on Splunk on AWS is a practical tutorial for professionals who wish to set up, manage, and analyze data with Splunk on AWS. This practical guide capitalizes on the scalability and flexibility of Amazon Web Services (AWS) to streamline your Splunk deployment. This book is a complete guide to Splunk, a powerful tool for analyzing and visualizing machine-

generated data. It explains Splunk's architecture, components, and data flow, helping you set up, configure, and index data effectively. Learn to write efficient Splunk Processing Language (SPL) queries, create detailed visualizations, and optimize searches for deeper insights. Discover advanced topics like clustering and integrating Splunk into modern DevOps practices and cloud-native environments. The book also shares best practices for administration, troubleshooting, and security. By the end of this guide, readers will be confident in utilizing Splunk on AWS to make data-driven decisions. Whether you want to improve your data analysis or use AWS for Splunk, this book will teach you the skills and insights you need in today's data-driven world. KEY FEATURES ● Understand Splunk's search language to query, analyze, and visualize data. ● Create interactive dashboards and reports to communicate insights effectively. ● Integrate Splunk with modern DevOps practices to improve monitoring and troubleshooting. WHAT YOU WILL LEARN ● How to deploy and configure Splunk effectively on AWS. ● Key concepts and tools in data onboarding and indexing. ● Mastery of the Splunk Processing Language (SPL) for data queries. ● Techniques for creating and managing interactive dashboards. ● Integration of Splunk with Kubernetes and CI/CD pipelines. ● Methods for applying machine learning in data analysis with Splunk. WHO THIS BOOK IS FOR This book is for IT professionals, data analysts, Splunk administrators, and cloud enthusiasts to improve their understanding of Splunk on AWS and extract valuable insights from their data. TABLE OF CONTENTS 1. Introduction to Splunk Basics and Benefits 2. Setting Up Splunk on AWS 3. Splunk Architecture Components 4. Splunk Clustering on AWS 5. Data Onboarding and Indexing 6. Mastering SPL for Data Queries 7. Data Pre-Processing and Analysis 8. Creating Data Visualizations in Splunk 9. Using Splunk Dashboard Studio 10. Advanced Techniques with Lookups and Macros 11. Integrating with Kubernetes and CI/CD 12. Natural Language Processing with Splunk 13. Splunk for Hybrid Environments 14. Extending Splunk with Apps and Add-ons 15. Configuration and Deployment Management in Splunk 16. Administration Techniques for Experts 17. Effective Troubleshooting in Splunk 18. Conclusion and Next Steps in Splunk

**Salesforce: Dashboards** 2017 Visualize your Salesforce data for more powerful insights. Learn how to create dashboards in Salesforce.

*PC Magazine* 2004

**Creating Actionable Insights Using CRM Analytics** Mark Tossell 2021-12-29 Leverage CRM Analytics to generate valuable business insights and solve business problems efficiently Key Features Extract, combine, transform, and visualize your data to derive business insights using CRM Analytics Gain hands-on experience as you walk through practical dashboard use cases in CRM Analytics Learn how to build best-in-class dashboards from a CRM Analytics thought leader Book Description CRM Analytics, formerly known as Tableau CRM and Einstein Analytics, is a powerful and versatile data analytics platform that enables organizations to extract, combine, transform, and visualize their data to create valuable business insights. Creating Actionable Insights Using CRM Analytics provides a hands-on approach to CRM Analytics implementation and associated methodologies that will have you up and running and productive in no time. The book provides you with detailed explanations of essential concepts to help you to gain confidence and become competent in using the CRM Analytics platform for data extraction, combination, transformation, visualization, and action. As you make progress, you'll understand what CRM Analytics is and where it provides business value. You'll also learn how to bring your data together in CRM Analytics, build datasets and lenses for data analysis, create effective analytics dashboards for visualization and consumption by end users, and build dashboard actions that take the user from data to insight to action with ease. By the end of this book, you'll be able to solve business problems using CRM Analytics and design, build, test, and deploy analytics dashboards efficiently. What you will learn Implement and configure CRM Analytics from scratch Build your first CRM Analytics app and embed your CRM Analytics dashboards in Salesforce to enhance user adoption Connect Salesforce and external data with CRM Analytics and create datasets Create a data recipe and get familiar with the recipe UI Build a custom dashboard in CRM Analytics using the dashboard editor Use lenses to create a CRM Analytics dashboard Configure and implement data security and governance Build configured record actions to automate data directly in Salesforce Who this book is for This book is for data analysts, business analysts, BI professionals, and Salesforce users who want to explore CRM Analytics' capabilities and features. Basic knowledge of Salesforce and data analytics is assumed to

get the most out of this book.

**Building Interactive Dashboards in Microsoft 365 Excel** Michael Olafusi 2024-02-29 Unleash the full potential of Microsoft Excel's latest version and elevate your data-driven prowess with this comprehensive resource Key Features Create robust and automated dashboards in Excel for M365 Apply data visualization principles and employ dynamic charts and tables to create constantly updated and informative dashboards for your organization Uncover the best practices for effective dashboard creation Purchase of the print or Kindle book includes a free PDF eBook Book Description M365 Excel is a modern Excel version that is constantly updated with features that make creating and automating analyses, reports, and dashboards very easy compared with older Excel versions. This book will help you leverage its full capabilities, beginning with a quick overview of what dashboards are and how they are different from other types of reports. Then, you'll familiarize yourself with the different standard dashboards currently available and what they are meant to accomplish for organizations. As you progress, you'll get to grips with the use of new powerful tools such as Power Query and dynamic array formulae in the automation of analysis, gaining insights into the right approach to take in building effective dashboards. You'll equip yourself with not only all the essential formulae, charts, and non-chart visuals but also learn how to set up your dashboard perfectly. Along the way, you'll build a couple of awesome dashboards from scratch to utilize your newfound knowledge. By the end of this book, you will be able to carry out an impressive and robust level of analysis on business data that may come from multiple sources or files, using better processes, formulae, and best practices in M365 to create insightful dashboards faster. What you will learn Understand the importance of dashboards in today's business analytics environment Delve into the various essential formulae in Excel Utilize Power Query to shape and transform data to extract insights easily Explore the power of the new dynamic array functions in M365 Employ PivotTable and Power Pivot to automate your dashboards Master the setup and optimization of your dashboard canvas Discover best practices for visualization, charts, and effective dashboard creation Consolidate your knowledge through a hands-on concluding project Who this book is for This book is for Microsoft Excel users, especially those tasked with creating dynamic reports and dashboards that require data and help support to decision-makers within an organization with visually engaging and actionable insights. Financial analysts, data analysts, business analysts, and BI professionals will also greatly benefit from this book. Some familiarity with the Microsoft Excel interface is a prerequisite.

**Getting Started with Salesforce Einstein Analytics** Johan Yu 2019-09-11 Build interactive dashboards using Salesforce Einstein analytics. Explore all of your data quickly and easily by providing AI-powered advanced analytics, right in Salesforce. You will manage datasets, query data with Salesforce Analytics Query Language (SAQL), and customize dashboards. Because Einstein Analytics is new, the curve to learn this technology can be difficult. This book guides you step-by-step in simple, easy-to-understand terms to get data from the Salesforce platform to the Einstein Analytics platform and also shows you how to import external data (e.g., CSV files). Core chapters focus on understanding data sources, dataflow, dataset, and lens leading up to building dashboards from scratch. Advanced features such as data transformation using computeExpression and computeRelative as well as dataflow with a multi-value lookup are explored. What You Will Learn Use data from Salesforce and external sources Create a dataflow to build a flexible dataset Build dashboards using Einstein Analytics Explore and analyze data using Einstein Analytics Utilize SAQL and binding to create advance dashboards Who This Book Is For IT users getting started with Einstein Analytics, Salesforce consultants starting new Einstein Analytics projects, and power users familiar with Salesforce reporting and dashboards who want to get up to speed on new analytics features [Salesforce Lightning Reporting and Dashboards](#) Johan Yu 2017-08-03 Learn how to build advanced reports and dashboards in Salesforce Lightning experience About This Book Visualize and create advanced reports and dashboards using Lightning Experience Improve overall business efficiency with advanced and effective reports and dashboards Understand and create custom reports and dashboards Who This Book Is For This book is targeted at Salesforce.com administrators, business analysts, and managers who use Salesforce.com for their daily job and want to learn in depth about Salesforce Reporting and Dashboard in Lightning Experience. Readers should have a basic knowledge of Salesforce, such as: Accounts, Contacts, Leads, Opportunities and custom objects. What You Will Learn Navigate in Salesforce.com within the

Lightning Experience user interface Secure and share your reports and dashboards with other users Create, manage, and maintain reports using Report Builder Learn how the report type can affect the report generated Explore the report and dashboard folder and the sharing model Create reports with multiple formats and custom report types Explore various dashboard features in Lightning Experience Use Salesforce1, including accessing reports and dashboards In Detail Built on the Salesforce App Cloud, the new Lightning Experience combines the new Lightning Design System, Lightning App Builder, and Lightning Components to enable anyone to quickly and easily create modern enterprise apps. The book will start with a gentle introduction to the basics of Salesforce reports and dashboards. It will also explain how to access reports in depth. Then you will learn how to create and manage reports, to use Schedule Report, and create advanced report configurations. The next section talks about dashboards and will enable you to understand and compare various types of dashboard component and how you can benefit the most from each of them. Then we move on to advanced topics and explain tips and tricks related to reports and dashboards, including reporting snapshots, report parameters, and collaboration. Finally, we will discuss how to access dashboards and reports from the Salesforce1 mobile app. Style and approach This comprehensive guide covers the advanced features of the all new Salesforce Lightning concepts and communicates them through a practical approach to explore the underlying concepts of how, when, and why to use them.

**Introduction to Marketing Analytics** Prof. Dr. R. Gopal, Prof. Dr. Gagandeep Kaur Nagra, Dr. Priya Vij 2024-10-15 Introduction to Marketing Analytics delves into the foundational elements of marketing, known as the 4Ps—Product, Price, Place, and Promotion—and expands upon them to include additional key components crucial for services marketing, such as People, Process, and Physical Evidence. These elements are vital for companies to develop coherent marketing strategies that not only attract new customers but also build long-term loyalty among existing ones. The rise of digital technologies has significantly transformed how companies engage with consumers and conduct market research. Big data analytics now allows for personalized marketing efforts, creating campaigns offering organizations the ability to better understand and respond to customer journeys. Moreover, the book highlights the growing role of artificial intelligence (AI) and machine learning in modern marketing strategies. By integrating these advanced technologies, businesses can better meet their customers' evolving needs, outpacing the competition. It covers various analysis techniques, such as marketing mix modelling, that help organizations understand the impact of different marketing activities on sales and other key performance indicators (KPIs). Through real-life examples and case studies, this book highlights a practical guide for professionals looking to apply data-driven marketing strategies to drive growth, innovation, and sustainable success in a constantly changing market landscape.

**Getting Started with Salesforce Einstein Analytics** Johan Yu 2019 Build interactive dashboards using Salesforce Einstein analytics. Explore all of your data quickly and easily by providing AI-powered advanced analytics, right in Salesforce. You will manage datasets, query data with Salesforce Analytics Query Language (SAQL), and customize dashboards. Because Einstein Analytics is new, the curve to learn this technology can be difficult. This book guides you step-by-step in simple, easy-to-understand terms to get data from the Salesforce platform to the Einstein Analytics platform and also shows you how to import external data (e.g., CSV files). Core chapters focus on understanding data sources, dataflow, dataset, and lens leading up to building dashboards from scratch. Advanced features such as data transformation using computeExpression and computeRelative as well as dataflow with a multi-value lookup are explored. You will: Use data from Salesforce and external sources Create a dataflow to build a flexible dataset Build dashboards using Einstein Analytics Explore and analyze data using Einstein Analytics Utilize SAQL and binding to create advance dashboards.

## Creating Dashboards In Salesforce

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