



Salesforce Sales Cloud (Users)

RPX101: Reporting Fundamentals in Lightning Experience

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- 1 Day

Upcoming Dates

Course Description

Reporting Fundamentals in Lightning Experience is a must for all users who need to report on the data managed within their Salesforce instance. This course will teach you how to customize existing reports as well as use the Salesforce reporting toolset to create your own reports. Information on building dashboards and enhancing your reports via formulas and filters is also provided to help you better analyze your business.

Course Outline

Reports Tab, Folders, and Formats

- Navigate the Reports Tab to Find Suitable Reports
- Create Custom Folders in Classic to be Used in Lightning
- Describe the Different Formats of Reports
- Run and Modify Existing Reports

Using the Report Builder

- Establish a Report Building Process
- Navigate the Report Builder
- Create Custom Reports Using a Standard Report Type
- Use Filters and Filter Logic
- Export Your Report

Summarizing Your Data

- Understand the Difference Between a Summary and Matrix Report
- Use Bucket Fields to Segment Your Data
- Use Custom Summary Formulas to Perform Calculations on Your Report Data

Getting More Insight from Your Data

- Add Conditional Highlighting to a Report
- Create Charts to Display Summary Data
- Schedule and Email a Report to Run

Dashboards

- Articulate What a Dashboard Is
- Understand the Benefits of Creating Dashboards in Lightning
- Create a Dashboard Using the Dashboard Builder

Audience

Reporting Fundamentals in Lightning Experience is ideal for Sales Rep/Managers, Service Rep/Managers, Beginning Admin, and Business Analyst/Solution Architects.

Prerequisites

What You Will Learn

- Work with standard reports.
- Establish a report building process.
- Build custom reports using different reporting formats in Lightning.
- Group and summarize reports in Lightning.
- Use field filters and filter logic.
- Add charts and conditional highlighting.
- Create dashboards in Lightning.