

# REPORTING FUNDAMENTALS



## OVERVIEW

Reporting Fundamentals is a must for all users who need to report on the data managed within their Salesforce instance. The course covers Salesforce's existing reports as well as the Salesforce reporting toolset, designed to help you customize existing reports and create your own reports. Information on building dashboards and enhancing your reports using formulas and filters is provided to help you analyze your business.

## WHO SHOULD TAKE THIS COURSE?

Reporting Fundamentals is designed for all users, including Sales and Service Managers, business analysts and administrators who need to use Salesforce reports to analyze their data.

## WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

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

## PREREQUISITES

The prerequisites include a solid understanding of basic Salesforce concepts and functionality, and completion of the following online courses which is available at <http://help.salesforce.com>:

- Getting Started: Navigating Salesforce



### DURATION

- 1 day

### DELIVERY FORMAT

- Classroom
- Virtual Classroom

### AUDIENCE

- All Salesforce users

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## MODULES & TOPICS

### Reports Tab, Folders and Formats

- Navigate the reports tab to find suitable reports
- Create report and dashboard folders
- Describe the different formats of reports.
- Run and modify standard reports

### Using the Report Builder

- Understand the importance of a report building process
- Explain what a report type is
- Determine when to use a standard report versus a custom report using a standard report type
- Print and Export your report

### Summarize Your Data

- Understand the difference between a Summary and a 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 concept of the running user
- Create a dashboard using the Dashboard Builder
- Understand drill downs, snapshots and push alerts



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