

# How to Create a Dashboard in Salesforce



# Creating Dashboards In Salesforce

**Sharif Shaalan**



## **Creating Dashboards In Salesforce:**

Salesforce: Dashboards Christopher Matthew Spencer, 2017

## **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

## **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 UIBuild a custom dashboard in CRM Analytics using the dashboard editorUse lenses to create a CRM Analytics dashboardConfigure and implement data security and governanceBuild configured record actions to automate data directly in SalesforceWho 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

**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

**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

**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

*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

**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

**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

*MicroStrategy Analytics Express User Guide* MicroStrategy Product Manuals, MicroStrategy, 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 Reporting and Dashboards* Johan Yu, 2015-03-26 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

*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.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

**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 advanced 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

**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

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

**Getting Started with Salesforce CRM Analytics** Johan Yu, 2024 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 You will 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

[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

**Learn Salesforce Lightning**  
Felicia Duarte, Rachel Hoffman, 2017-12-20

Refer to this invaluable how-to guide for basic training on Salesforce Lightning  
Salespeople and technical users and consultants will no longer have to resort to learning the interface on their own which is very time consuming  
Learn Salesforce Lightning is a step-by-step visual guide that offers immediate and valuable solutions to the new set of UI tools included in Lightning  
With chapters broken down into easily absorbed topics you walk through the entire process of managing your daily activities within Salesforce as well as basic customizations and system management  
The book explains the primary use cases for Lightning and simplifies some of the more complex features such as opportunity stage management and the new dashboard builder  
Topics covered include Sales and service management  
Lightning Apps on the AppExchange  
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What You'll Learn  
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