



# Salesforce Reporting and Dashboards

*Johan Yu*

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**Salesforce Reporting and Dashboards** Johan Yu

**Master the art of building successful reports and dashboards with this comprehensive guide**

## About This Book

- Visualize and create advanced level reports and dashboards using Salesforce.com
- Take advantage of creating reports and dashboards in the Salesforce mobile app, updated with Spring '15 release
- A concise and informative guide to solve all your reporting woes

## 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.

## 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

## In Detail

Salesforce.com is the leading CRM platform. It offers cloud functionality even at the enterprise level. One of its most powerful features is the ability to build reports and dashboards without code and get a result in minutes. This feature is useful for multinational companies as well as small-scale ones.

Salesforce Reporting and Dashboards provides practical information for system administrators to understand, control, and manage permissions related to the report folder, report, and dashboard management. This book starts with an overview of the entire Salesforce technology and then moves on to the more important topics of allocating permissions and choosing the correct reports to improve efficiency.

The book then explores reports?creation, editing, navigation, and deletion. You will also learn which report is essential to which type of users. The next topic introduced is the dashboard feature, its main uses, and functionality.

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