Reporting Fundamentals in Lightning Experience (RPX101)

ID RPX101   **Price** on request   **Duration** 1 day

Who should attend

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

Prerequisites

Prior experience with Salesforce and developing reports in Salesforce Classic is highly recommended, but not required.

Course Objectives

- 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.

Course Content

Introducing the Course

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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

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