



# Salesforce Reporting and Dashboards

By Johan Yu

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**Salesforce Reporting and Dashboards** By 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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### Editorial Review

About the Author

#### Johan Yu

Johan Yu has more than 17 years of experience working in the IT field across MNCs and leading Salesforce.com consulting companies across the Asia-Pacific region. Johan has worked on Salesforce technology for more than 10 years. He started his career with the Salesforce technology as a developer, team leader, technical manager, and consultant. He now enjoys working as global Salesforce.com system administrator and solution architect in an MNC. Based in Singapore, Johan holds multiple Salesforce certifications, including Administrator, Advanced Administrator, Sales Cloud Consultant, and Developer. In his spare time, he enjoys writing blogs related to Salesforce technology (<http://simplysfdc.blogspot.com>) and answering questions in the Salesforce success community. In May 2014, Johan became the first Salesforce MVP from Singapore and also the first in Southeast Asia. He is also a co-leader of the Salesforce Singapore user group and is keen to help members solve issues related to the Salesforce, such as implementation, adoption, and technical issues. You can connect with him on Twitter at @simplysfdc.

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