

**Salesforce Reports and Dashboards in Lightning Experience**

**Course Number:** SF-118  
**Duration:** 1 day

**Overview**

This Salesforce® Reports and Dashboards in Lightning Experience training course teaches administrators, business analysts, and report writers how to get the most out of the basic and advanced analytic capabilities of the Salesforce Lightning Report Builder. Students learn the Salesforce object model and how to create and secure reports and dashboards.

**Prerequisites**

No prior experience is presumed.

**Materials**

All Salesforce training students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Salesforce is web-based and attendees only need an Internet connection and modern web browser for training. Salesforce recommends Chrome.

**Objectives**

* Create tabular, summary, matrix, and join reports
* Use advanced reporting functionality including charting, report summary fields, bucket fields, conditional highlighting, advanced report filters, and custom report types
* Create and run dashboards and schedule and email reports and dashboards

**Outline**

* Introduction/Login to Training Orgs
* Overview of Salesforce Object Model
* Report Types
  + Tabular/Summary/Matrix/Join Reports
* Customizing Reports
  + Filtering/Charts/Bucket Fields/Report Summary Fields/Conditional Highlighting
* Custom Report Types
* Dashboards
* Report and Dashboard Scheduling
* Conclusion