

Salesforce Admin Exam Study Guide: Analytics - Reports & Dashboards (12%)

Salesforce Basics: For Complete Beginners

If Salesforce is a total mystery to you, don't sweat it—here's a huge, friendly scoop to get you comfy, confident, and excited to learn.

- **What is Salesforce?**
 - It's an online tool that businesses use to keep all their important stuff in one place—think customer names, sales deals, team to-dos—no need for clunky software or tech headaches.
 - Picture it as your business's personal organizer, like a super-smart assistant who never forgets where anything is and helps everyone stay on track.
- **Why It's So Awesome:**
 - It cuts through the mess—like searching through a pile of papers or emailing back and forth—and puts customer info, sales progress, and work tasks in one tidy hub. Whether your team's chasing down sales, helping customers, or planning projects, it's like a teamwork superpower that saves time and keeps everyone in the loop.
 - As an admin, you're the hero who shapes it to fit your team—like teaching a robot assistant your company's unique rhythm, making sure it works just right for everyone.
- **Key Words to Get You Started:**
 - **Org:** Your company's own Salesforce playground—like your team's private clubhouse where all the data lives and the action happens.
 - **Setup:** The control center (top-right gear icon on the screen) where you tweak things—like the dashboard of your Salesforce spaceship, letting you steer and adjust.
 - **CRM:** Customer Relationship Management—just a fancy way of saying Salesforce is all about keeping customers happy, organized, and at the heart of your business.
- **What This Topic Is All About:**
 - This section is your crash course in turning Salesforce data into stories—using reports to list out details like “Who's buying?” and dashboards to show

it off with cool charts and numbers like “How much did we sell?” It’s like learning to be the data detective and artist for your team.

Let’s dive in with a beginner’s curiosity and build this up together!

Overview

"Analytics - Reports & Dashboards" is about taking the raw data in Salesforce—like names, dates, and dollar amounts—and turning it into something your team can use to make smart decisions. You’ll learn to create reports (like detailed lists or totals) and dashboards (like visual snapshots with graphs) to answer questions like “Which reps are crushing it?” or “Are we hitting our goals?” It’s 12% of the exam—a solid piece of the puzzle that’s all about showing off what’s happening in your org.

Exam Weight

- **Percentage:** 12%
- **Why It’s a Big Deal:** Reports and dashboards are how your team sees the story behind the numbers—without them, it’s like guessing in the dark. With 12%, this is a key part of your test score and a must-have skill for proving your admin chops in the real world.

Objectives (In Super-Easy Terms)

- Get the hang of making reports—like lists of customers or sales sums—that pull exactly the data you need.
 - Learn to build dashboards—like charts and big numbers—that make report info pop and easy to understand.
 - Figure out how to tweak reports and dashboards—like sorting, filtering, or grouping—so they answer specific questions your team has.
 - Practice sharing reports and dashboards—like giving your team the perfect view—so everyone knows what’s up without digging.
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Structure of the Study Guide

- **Definitions:** Big, detailed explanations of key terms.
- **Categories:** Topics broken into manageable pieces.

- **Bullet Points:** Massive, beginner-friendly summaries with heaps of detail.
 - **Tables:** Side-by-side comparisons to keep it clear.
 - **Practical Scenarios:** Tons of real-world examples you can imagine doing.
 - **Study Tips:** Step-by-step ways to master this.
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Definitions (Huge Summaries with Tons of Beginner Details)

- **Report:**
 - **What It Is:** A way to pull and organize Salesforce data—like a list of all your Leads or a summary of sales totals.
 - **Details:** Think of it as your data notepad—it grabs info from Salesforce (like Accounts, Opportunities, or Cases) and lays it out so you can see what’s going on. Want a list of every customer with an email address? A report can do that. Need to know how much each rep sold this month? A report can add it up. It’s like flipping through a filing cabinet and jotting down what you find, customized however you want.
- **Dashboard:**
 - **What It Is:** A visual display—like charts, graphs, or big numbers—that shows report data in a quick, eye-catching way.
 - **Details:** This is your data billboard—it takes the numbers from reports and turns them into pictures that anyone can understand fast. Instead of a long list, you get a bar chart showing sales by team or a gauge hitting your goal. It’s like a TV screen flashing the highlights—less about the nitty-gritty, more about “Here’s what matters right now!”
- **Report Type:**
 - **What It Is:** The foundation of a report—like “Accounts” or “Opportunities with Contacts”—that decides what data you can work with.
 - **Details:** Imagine it as the recipe you start with—it tells Salesforce which buckets of data (objects) and pieces (fields) you’re pulling from. Pick “Accounts,” and you get Account fields like “Name” and “Phone”; pick “Opportunities with Contacts,” and you can mix in Contact stuff too. It’s like choosing “Vegetables” to cook with—you’ll get carrots and peas, not fruit.

- **Filter:**
 - **What It Is:** A rule to narrow down report data—like “only show deals from this year” or “just West Coast customers.”
 - **Details:** This is your data strainer—it sifts through everything and keeps only what fits. You might filter a report to show “Closed Won” Opportunities or Accounts with “State = CA”—it’s how you cut through the noise and focus on what you care about, like picking only red candies from a bowl.
 - **Dashboard Component:**
 - **What It Is:** A single piece of a dashboard—like a chart, gauge, or number—that shows data from a report.
 - **Details:** Think of it as a Lego brick—each component pulls info from a report and builds part of your dashboard’s big picture. You might have a pie chart for Lead Sources, a big number for total sales, or a table of top deals—put them together, and you’ve got a snapshot that tells a story.
 - **Report Folder:**
 - **What It Is:** A place to store and organize reports—like a filing drawer—so you can find them later and control who sees them.
 - **Details:** This is your report bookshelf—you save reports here (e.g., “Sales Reports” or “Support Stats”) and decide who gets access. It’s like putting papers in labeled folders—keeps things tidy and secure.
 - **Dashboard Folder:**
 - **What It Is:** A spot to save dashboards—like a display case—so your team can find and use them.
 - **Details:** Similar to report folders, this is where dashboards live—like “Team Dashboards” or “Manager Views.” You set permissions here too—like “Sales Team only”—so the right people see the right visuals.
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Categories

- **Analytics Tools:** The ways you dig into and display data.
 - Reports (Types, Formats, Filters, Grouping)

- Dashboards (Components, Layout, Features)
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Detailed Breakdown (Bullet Points with Massive Beginner Summaries)

1. Analytics Tools

- **Reports**

- **Summary:** Tools to create detailed lists, summaries, or comparisons of Salesforce data—like all your Leads, sales totals, or case stats—customized to show exactly what you need.
- **Details:**
 - Reports are your data explorers—they dive into Salesforce, grab the info you want, and organize it so you can understand what’s happening. Want a list of every Contact with a phone number? A report can pull that. Need to know how much each rep sold this year, grouped by region? A report can crunch it. It’s like having a super-smart librarian who finds and sorts everything for you, whether it’s a simple list or a big summary.
 - **How You Set It Up:** Head to the “Reports” tab (find it in the app launcher—click the 9-dot icon). Here’s the full, beginner-friendly walkthrough:
 - **Start a Report:** Click “New Report”—it’s like opening a blank page to write your data story.
 - **Pick a Report Type:** Choose your data foundation—like:
 - **Accounts:** Just Account data—like “Name,” “Phone,” “Industry.”
 - **Contacts:** Just Contact data—like “Name,” “Email,” “Title.”
 - **Opportunities:** Sales deals—like “Amount,” “Stage,” “Close Date.”
 - **Opportunities with Contacts:** Links Opportunities to Contacts—like “Opportunity Name” plus “Contact Email.”

- **Custom Objects:** Stuff your team made—like “Orders__c” with “Order Number” and “Total.”
 - It’s like picking which toy box to open—you’ll only get what’s inside that box (and maybe related boxes if it’s a “with” type).
- **Choose a Format:** Decide how it looks—each one’s like a different lens:
 - **Tabular:** A plain list—like “Name, Email, Phone” in rows. Perfect for simple stuff—like all Leads from a campaign. Think of it as a grocery list—no totals, just items.
 - **Summary:** Groups data with totals—like sales by “Stage” (Prospecting, Closed Won) or “Owner.” You get sums or counts—like “Total Amount = \$50,000” per rep. It’s like sorting candies into piles and counting each pile.
 - **Matrix:** A grid—like sales by “Rep” (rows) and “Month” (columns). Shows two angles at once—like “Jane’s sales in January vs. February.” It’s like a checkerboard of numbers.
 - **Joined:** Mixes multiple report types—like “Accounts” plus “Opportunities” in one report. Rare for beginners—it’s like cooking two recipes at once, tricky but powerful.
- **Add Columns:** Drag fields from the left—like “Account Name,” “Amount,” “Close Date”—to show in your report. It’s like picking what goes on your whiteboard—only show what matters.
- **Set Filters:** Narrow it down in the “Filters” pane—like:
 - **Standard Filters:** Built-in—like “Show Me = All Opportunities,” “Date Field = Close Date,” “Range = This Year.”
 - **Field Filters:** Add your own—like “Stage = Closed Won” or “Amount > 10,000.” Click “Add Filter” and type it in.

- **Cross Filters:** Fancy stuff—like “Accounts with Opportunities” (only Accounts linked to deals). It’s like saying “Only apples with seeds.”
 - It’s your way to zoom in—like “I only want green marbles from this jar.”
 - **Group Rows:** For Summary or Matrix, group by a field—like “Owner” (sales per rep) or “Region” (sales per area). Click “Group Rows” and pick—it’s like stacking books by author.
 - **Summarize Data:** Add totals—like “Sum of Amount” or “Count of Records.” Drag a field to the “Summary” area—like summing “Amount” to see total sales. It’s your calculator step.
 - **Run It:** Click “Run”—Salesforce pulls the data and shows it—like a table of “Closed Won” Opportunities or a grid of sales by rep and month.
 - **Save It:** Click “Save,” name it (e.g., “2025 Sales by Rep”), pick a Report Folder (e.g., “Sales Team Reports”), and set access—like “All Users” or “Managers Only.” It’s like filing your finished list for later.
- **Why It’s Great:** It’s like a build-your-own adventure—you can make a quick list (Tabular), add up totals (Summary), or compare two things (Matrix). For example, a Tabular report lists every Lead with “Source = Trade Show,” while a Summary report totals Opportunity “Amount” by “Stage”—it’s all about flexibility to fit your question.
 - **What’s Tricky:** The Report Type sets your limits—if you pick “Accounts” but need Opportunities, you’re stuck. Filters need care—like “This Year” means 2025 only, not “last 12 months.” Big reports (over 2,000 rows) might cut off on-screen—you’ll need to export to CSV or Excel to see it all. And grouping too many levels (e.g., “Owner” then “Region” then “Stage”) can get messy fast.
 - **Real-Life Example:** Your marketing lead says, “Give me all Leads from our email blast.” You pick “Leads” Report Type, Filter “Lead Source = Email Campaign,” add columns “First Name, Last Name, Email, Company,” set it as Tabular, run it, and save as “Email Blast Leads”—a perfect list for follow-ups.

- **Another Example:** Your boss asks, “How much did each rep close this quarter?” Pick “Opportunities” Report Type, Filter “Close Date = This Quarter” and “Stage = Closed Won,” group by “Opportunity Owner,” sum “Amount,” set as Summary, save as “Q1 Rep Sales”—totals per rep in a snap.
- **Third Example:** You need “Sales by region and month.” Pick “Opportunities,” Filter “Close Date = This Year,” group rows by “Region,” columns by “Close Date” (monthly), sum “Amount,” set as Matrix—shows a grid like “West: \$10K Jan, \$15K Feb.”
- **Cool Features:**
 - **Charts:** Add a chart—like a bar for “Amount” by “Stage”—right on the report page (click “Add Chart”).
 - **Conditional Highlighting:** Color rows—like “Amount > 50,000” in green (in “Customize”).
 - **Export:** Click “Export” to CSV or Excel—like sending “All Contacts” to a spreadsheet for a mail merge.
 - **Scheduled Reports:** Set it to email weekly—like “Monday Sales Update” (in “Schedule Report”).
- **Dashboards**
 - **Summary:** Visual tools—like charts, gauges, or tables—that display report data in a fast, colorful way to give your team instant insights.
 - **Details:**
 - Dashboards are your data spotlight—like a TV screen flashing the headlines of your reports. Instead of wading through rows, your team sees a bar chart of sales by rep, a pie chart of Lead Sources, or a big number for total deals closed—all at a glance. It’s less about digging into details and more about “Here’s the big win!” or “Here’s where we’re at!”—perfect for managers, meetings, or quick check-ins.
 - **How You Set It Up:** Go to the “Dashboards” tab (in the app launcher). Here’s the mega-detailed rundown:
 - **Start a Dashboard:** Click “New Dashboard,” name it (e.g., “Sales Team Q1”), pick a Dashboard Folder (e.g., “Sales

Dashboards”), and set access—like “Sales Team Only” or “All Users.” It’s like setting up a bulletin board for your data.

- **Add Components:** Click “+ Component” to add visual pieces—each one’s like a window into a report:
 - **Pick a Source Report:** Choose a saved report—like “Q1 Rep Sales” or “Email Blast Leads.” It’s the data fuel—every component needs one.
 - **Choose a Component Type:** Decide how it looks—here’s the lineup:
 - **Bar Chart:** Bars for each group—like “Amount” by “Owner.” Great for comparing—like “Jane vs. Mike’s sales.”
 - **Column Chart:** Vertical bars—like “Cases Closed” by “Month.” Similar to bars but stacked differently.
 - **Pie Chart:** Slices—like percentage of Leads by “Source.” Shows how a total splits up—like “20% Email, 30% Web.”
 - **Donut Chart:** Like a pie but with a hole—like Opportunities by “Stage.” Same idea, fancier look.
 - **Line Chart:** Lines over time—like “Amount” by “Close Date” (monthly). Tracks trends—like “Sales up since January.”
 - **Gauge:** A dial—like total “Amount” vs. a goal (e.g., \$100,000). Shows progress—like “80% to target!”
 - **Metric:** A big number—like “Total Closed Won Amount = \$75,000.” Bold and simple—like a scoreboard.
 - **Table:** A mini-list—like top 5 Opportunities by “Amount.” Condensed data—like “Biggest deals this month.”

- **Scatter Chart:** Dots—like “Amount” vs. “Probability” per Opportunity. Shows patterns—less common but cool.
- **Customize Each One:** Set details—like:
 - **Title:** Name it—like “Sales by Rep” or “Lead Breakdown.”
 - **Fields:** Pick what to show—like “Sum of Amount” for a Gauge or “Count” for a Pie.
 - **Filters:** Add extra focus—like “Region = West” on top of the report’s filters.
 - **Colors/Size:** Tweak the look—like blue bars or a bigger gauge.
- It’s like painting a picture—each component tells part of the story.
 - **Arrange the Layout:** Drag components around—like putting “Sales by Rep” at the top, “Goal Gauge” in the middle, “Lead Sources” below. You can fit up to 20 components—think of it as arranging photos on a wall.
 - **Add Dashboard Filters:** Click “+ Filter” to zoom all components—like “Region = East” or “Close Date = This Quarter.” Every chart adjusts—like a master switch for focus.
 - **Save & Run:** Click “Save,” then “Run”—it pulls fresh data from the reports every time someone opens it. It’s like hitting “Play” on your data movie.
- **Why It’s Great:** It’s like a highlight reel—turns boring numbers into visuals that grab attention. For example, a dashboard with a Bar Chart of “Sales by Owner,” a Gauge of “Total Amount vs. Goal,” and a Pie Chart of “Lead Sources” tells your team instantly how they’re doing—no spreadsheets needed. It’s perfect for quick updates or impressing the boss.
- **What’s Tricky:** It’s only as good as your reports—if a report misses data (e.g., wrong filters), the dashboard’s off too. Picking the right component matters—like a Pie Chart with 50 slices is a mess, use a

Bar instead. And data doesn't update live—it refreshes when viewed or scheduled, so it's a snapshot, not a ticker.

- **Real-Life Example:** Your sales manager wants a “Q1 Overview.” You build a dashboard: Bar Chart from “Q1 Rep Sales” (sales by “Owner”), Gauge from “Opportunities” (total “Amount” vs. \$50,000 goal), Pie Chart from “Leads” (by “Source”), save as “Q1 Sales Snapshot”—ready for the next huddle.
- **Another Example:** Support team needs “Case Pulse.” Dashboard has a Line Chart (Cases closed by “Close Date” monthly), Table (top 5 open Cases by “Priority”), Metric (total “Cases Closed This Week”)—one glance shows trends and hot spots.
- **Third Example:** Marketing wants “Campaign Impact.” Dashboard has a Donut Chart (Leads by “Campaign”), Column Chart (Opportunities by “Campaign Name”), Metric (“Total Leads Generated”)—shows which campaigns rock.
- **Cool Features:**
 - **Dynamic Dashboards:** Show data based on who's looking—like a rep sees only their sales, a manager sees all (Setup > Dashboards > “View As” = “Logged-in User”).
 - **Scheduled Refresh:** Email it as a PNG—like “Weekly Sales PNG” every Monday at 8 AM (click “Schedule Dashboard”).
 - **Drill Down:** Click a chart piece—like “West” in a Bar Chart—to jump to the report details (automatic link).
 - **Running User:** Set who's “eyes” it uses—like “Run as Admin” to see all data, not just the viewer's (in Dashboard settings).
 - **Conditional Formatting:** Highlight gauges—like green for “Above Goal,” red for “Below” (in component settings).

Tables

Table 1: Reports vs. Dashboards

What's Different Reports

Dashboards

What's Different Reports

Dashboards

What It Does	Lists or sums data	Shows visuals from reports
Format	Tables, groups, totals	Charts, gauges, numbers
Detail Level	Deep—raw data	High-level—quick insights
Examples	List of all Leads	Bar chart of sales by rep
Who Uses It	Analysts digging in	Managers wanting fast views

Table 2: Report Formats vs. Uses

Format	What It Looks Like	Best For	Example
Tabular	Simple list—like a spreadsheet	Basic lists	All Contacts with emails
Summary	Groups with totals—like piles	Totals or counts	Sales by owner
Matrix	Grid—like a table	Two-way comparisons	Sales by rep and month
Joined	Multiple types combined	Linking different data	Accounts with Opportunities

Table 3: Dashboard Component Types

Component	What It Shows	Best For	Example
Bar/Column Chart	Bars for groups	Comparing categories	Sales by rep
Pie/Donut Chart	Slices of a whole	Showing proportions	Leads by source
Line Chart	Lines over time	Tracking trends	Cases closed monthly
Gauge	Dial vs. goal	Progress to target	Total sales vs. \$100K
Metric	Big number	Single key stat	Total Opportunities closed
Table	Mini-list	Top/bottom records	Top 5 open Cases

Practical Scenarios

1. Lead List for Follow-Up:

- **Need:** List all Leads from a trade show this month.
- **Solution:** Reports > New Report, “Leads” Report Type, Filter “Lead Source = Trade Show” and “Created Date = This Month,” columns “Name, Email, Phone,” Tabular, save as “Trade Show Leads.”

2. Sales by Region and Stage:

- **Need:** Total Opportunity amounts by region and stage this year.
- **Solution:** Reports > New Report, “Opportunities,” Filter “Close Date = This Year,” group rows by “Region,” columns by “Stage,” sum “Amount,” Matrix, save as “2025 Region-Stage Sales.”

3. Team Performance Dashboard:

- **Need:** Visual snapshot for sales team.
- **Solution:** Dashboards > New Dashboard, Bar Chart (from “2025 Region-Stage Sales,” “Amount” by “Owner”), Gauge (from “Opportunities,” “Sum of Amount” vs. \$75,000), Pie Chart (from “Leads,” “Count” by “Source”), Filter “Close Date = This Quarter,” save as “Q1 Team Pulse.”

4. Case Resolution Trends:

- **Need:** Track Cases closed monthly and top priorities.
- **Solution:** Reports > “Cases,” Filter “Status = Closed,” group by “Closed Date” (monthly), sum “Case Number,” Summary, save as “Closed Cases.” Dashboard > Line Chart (from “Closed Cases”), Table (from “Cases,” top 5 by “Priority,” Filter “Status = Open”), save as “Case Trends.”

5. Campaign Success:

- **Need:** Show Leads and Opportunities by campaign.
 - **Solution:** Reports > “Leads,” group by “Campaign,” save as “Campaign Leads.” Reports > “Opportunities,” group by “Campaign Name,” save as “Campaign Opps.” Dashboard > Donut Chart (“Campaign Leads”), Bar Chart (“Campaign Opps”), Metric (“Total Leads”), save as “Campaign Impact.”
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Study Tips

- **Hands-On:** Get a free org (developer.salesforce.com)—make a Tabular report, a Summary with a chart, then a Dashboard with three components.
- **Start Simple:** Trailhead’s “Reports & Dashboards for Lightning Experience”—free, with videos and hands-on tasks.
- **Focus:** Master Report Types (data base), Formats (list vs. grid), Filters/Grouping (focus data), Dashboard Components (visual choices).
- **Practice:** Do exam-style questions—“Report for Q1 sales?” or “Dashboard for Leads by source?”—daily drills.
- **Beginner Boost:** Watch “Salesforce Reports & Dashboards 101” on YouTube; build one report and one dashboard component daily—start small, grow big.
- **Time:** Spend 12% here—6-7 hours of 50—split: 4 on Reports (types, filters), 3 on Dashboards (components, layout).