



# Introduction to Salesforce Analytics - Building Reports & Dashboards (SPRD-101)

Course ID #: 6510-101-RD-W

Hours: 5

## Course Content

### Course Description:

This class is delivered by a live instructor and is specifically designed to teach administrators, business analysts or report writers how to utilize the basic and advanced analytic capabilities of Salesforce.

A student in this class will learn the basic Salesforce object model, and how to create and secure reports and dashboards. The instructor will lead students through exercises to create tabular, summary, matrix and join reports. Students will learn advanced reporting functionality such as charting, report summary fields, bucket fields, conditional highlighting, advanced report filters and building custom report types. Finally, the student will learn how to create and run dashboards and schedule and email reports and dashboards.

Each student will be given a practice learning environment to participate in hands-on exercises during the class. The student will be able to use that learning environment indefinitely after the class without any additional fee.

### Target Student:

New administrators, business analysts or report writers who are new to creating reports or dashboards within Salesforce.

### Topics:

- Introductions / Login to Training Orgs
- Overview of Salesforce Object Model
- Tabular, Summary, Matrix, Join Reports
- Charts, Bucket Fields, Report Summary Fields, Conditional Highlighting
- Custom Report Types
- Dashboards
- Report & Dashboard Scheduling