



# Salesforce Reports & Dashboards in Lightning Experience (SP-RPX101)

Course ID #: 7000-438-ZZ-Z

Hours: 6

## 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 the Salesforce Lightning Report Builder. This class is an alternative to the Reporting Fundamentals in Lightning Experience (RPX101) offered by Salesforce.

### At Course Completion:

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 hands-on 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.

### Prerequisites:

None; some experience using Salesforce Classic or Lightning is helpful but not required.

### Target Student:

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

### 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