Session 6 Homework

Trailhead moduls:

- Knowledge Basics for Lightning Experience: https://trailhead.salesforce.com/content/learn/modules/lightning-knowledge-basics
- Set Up Salesforce Knowledge: https://trailhead.salesforce.com/content/learn/projects/set-up-salesforce-knowledge
- Chatter for Lightning Experience: https://trailhead.salesforce.com/content/learn/modules/chatter_basics_for_users
- Chatter Administration for Lightning Experience: https://trailhead.salesforce.com/content/learn/modules/lex_implementation_chatter
- Reports & Dashboards for Lightning Experience: https://trailhead.salesforce.com/content/learn/modules/lex_implementation_reports_dashboards
- Create Reports and Dashboards for Sales and Marketing Managers: https://trailhead.salesforce.com/content/learn/projects/create-reports-and-dashboards-for-sales-and-marketing-managers

---

Additional Exercises (after completing the above moduls)

Use a new playgorund for these exercises!

Won Opportunities

Your CEO would like to see a report that shows WON opportunities.

- On Reports, click New Report, choose the ‘Opportunities’ report type.
- Click Filters, then apply the following filters:
  - For the Show Me standard filter, select `All opportunities` and click Done.
  - For the Opportunity Status standard filter, select `Closed Won` and click Apply.
  - For the date standard filter, select Created Date and `All Time` for the range and click Apply.
- The following columns should be included: `Opportunity Name`, `Amount`, `Close Date`
- Sort the Opportunities by `Close Date` so that the latest ones are at the top of the list
- Click Save.
- Name your report `Won Opportunities`.

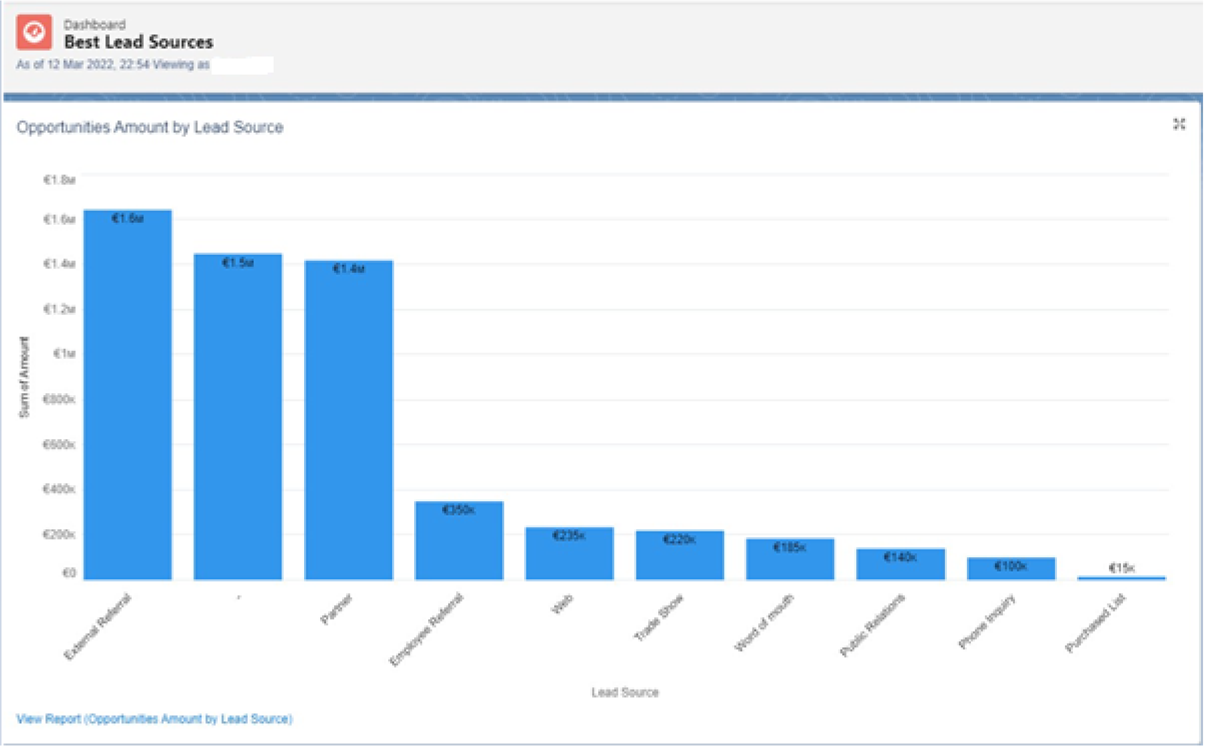
Click Run.

- Export the report and check the downloaded Excel file
- Subscribe to the report: get notified every Monday

Best Lead Sources

Your CEO would like to see a report of the best lead sources to decide which channel to boost in the future.

He'd like to have a Dashboard that looks like this:



Dashboard Name: Best Lead Sources

It contains a report of Opportunities grouped by the Lead Source and summarized by the Amount.

Report Name: Opportunities Amount by Lead Source

The Report has a column chart:

- The Lead Source is shown on the X-Axis
- The Sum of Amount is shown on the Y-Axis

Opportunities By Sales Rep

Your CEO would like to see a report that sums up the Opportunities by sales reps. He has access to hundreds of reports, so asks you to create a folder called `Global Sales Reports` and save it in there.

The following fields are relevant for the CEO: `Opportunity Owner`, `Account Name`, `Opportunity Name`, `Stage`, `Amount`, `Expected Revenue`, `Probability`, `Close Date`

The report should by grouped by `Opportunity Owner` and have a summary field for the `Amount`. The `Close Date` of the opportunities should be set to the current financial quarter.

Hint

- *in order to be able to see the report you created as your CEO will, you should assign the CEO role for your user*
- *to see actual opportunities in your report you should update the Close Date of all of the opportunities to today's date (you only need to do it at one record if you select them all and apply the change for all of the selected items)*

High-Level Accounts

One of our quarterly objectives is to increase the influence with the Strategic Accounts. One way to achieve this is to have the CEO on the contact list.
A Strategic Account is an account that has an Opportunity worth more than €10,000.

Create a new report called `High-Level Accounts`, which lists all the Accounts where the CEO is on our Contacts list and has at least one Opportunity with an Amount larger than €10,000.

Columns: Account Name, Account Owner, CEO Full Name

Hint: the *Title* field of the Contact contains the title of the contact.

Report for Vince

Vince is the VP of Marketing and he would like to see all customer accounts based in Texas (TX), North Calorina (NC), Illinois (IL) and New York (NY) and have either a rating of Hot or Warm or an annual revenue of $2 million and up.

The following fields are relevant for him: `Account Owner`, `Account Name`, `Billing State/Province`, `Type`, `Rating`, `Annual Revenue`

Save it in the *Global Sales Reports* folder and name the report `Marketing Target Accounts`.

You will see a report and records similar to this:

	Account Owner	Account Name	Billing State/Province	Type	Rating	Annual Revenue
1	[illegible]	Edge Communications	TX	Customer - Direct	Hot	€139,000,000
2	[illegible]	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	€350,000,000
3	[illegible]	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	€500,000,000
4	[illegible]	United Oil & Gas Corp.	NY	Customer - Direct	Hot	€5,600,000,000
5						€6,589,000,000

Hint

- *you should filter the accounts for those that contains* `customer` *in their* `Type` *field*

- *you can use the* `Billint State/Province` *field to filter the accounts based on where they are based*
- *you will need to use filter logic to meet all the requirements of the report*

Bucket Fields

Bucketing lets you segment your report data on the fly by defining a set of categories, or “buckets”, to sort, group, or filter the records.
Let's see how to use them fulfilling the new request of Vince.

He would like to see the opportunities that has a `Close Date` in the current FQ and their `Opportunity Status` is open. You will need the following columns: `Account Name`, `Opportunity Name`, `Amount`, `Expected Revenue`, `Probability`, `Close Date` and `Next Step`.

The rows should be grouped by `Opportunity Owner` and `Stage`.

He wants an extra detail column called `Size` that should categorize the opportunities based on the `Amount`. Ones bellow €50 000 should be `Small`, bellow €100,000 should be `Medium` and above that they should be `Large`.

Hint:

create a new Bucket Column for this

He also not really interested in the details for now, he is only curious about the number of records in each category so he can use it in a presentation for the upcoming board meeting.

Hint:

your going to need to group the columns by the new bucket field

He expects to see something like this, saved in the Global Sales Reports, under the name of `Pipeline Matrix Report Current FQ`:

Opportunity Owner ↑	Stage ↑	Size →	Small	Medium	Large	Total
	Prospecting	Record Count	0	1	0	1
	Qualification	Record Count	1	0	0	1
	Needs Analysis	Record Count	0	0	1	1
	Value Proposition	Record Count	0	1	1	2
	Id. Decision Makers	Record Count	2	1	0	3
	Perception Analysis	Record Count	0	0	1	1
	Proposal/Price Quote	Record Count	0	1	1	2
	Negotiation/Review	Record Count	0	0	2	2
	Subtotal	Record Count	3	4	6	13
Total		Record Count	3	4	6	13