Kraytix
FRONTRUNNER

How to Get Started with FrontRunner Reports and Dashboards

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Conventions

This document uses a number of typographical conventions to highlight text that refers to a user's interaction with Salesforce and/or FrontRunner:

- **`Courier New Bold`** font draws the reader's attention to user interface elements, such as buttons, command links and fields. Example: "Click the **`Save`** button."
- `Courier New` font indicates values that need to be entered by the user. Example: "Enter `Profiles` in the **`Quick Find`** box."
- *`Italicised Courier New`* font indicates values that are displayed by Salesforce or FrontRunner. Example: "Check that the user is assigned the *`Standard User`* profile."

Document Version

This document is compatible with Kraytix FrontRunner Version 1.11.

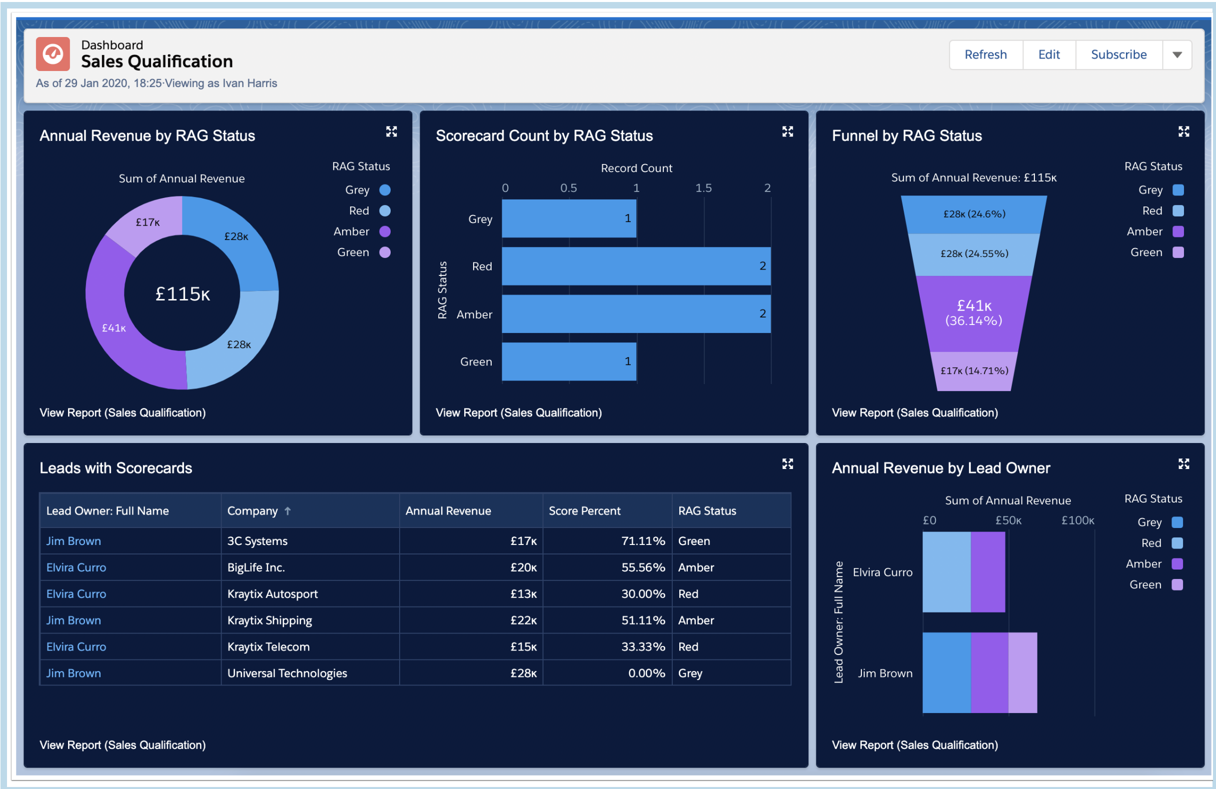
1 Introduction

This guide will show you how to create an example FrontRunner report and a dashboard. You will then be able to modify them or create your own.

> ***Note**: For more information about building reports and dashboards, please refer to the Salesforce documentation at: https://help.salesforce.com/articleView?id=analytics_overview.htm.*

2 Guide Objective

After completing the steps in this guide you will have created the following Sales Qualification dashboard and its supporting report:



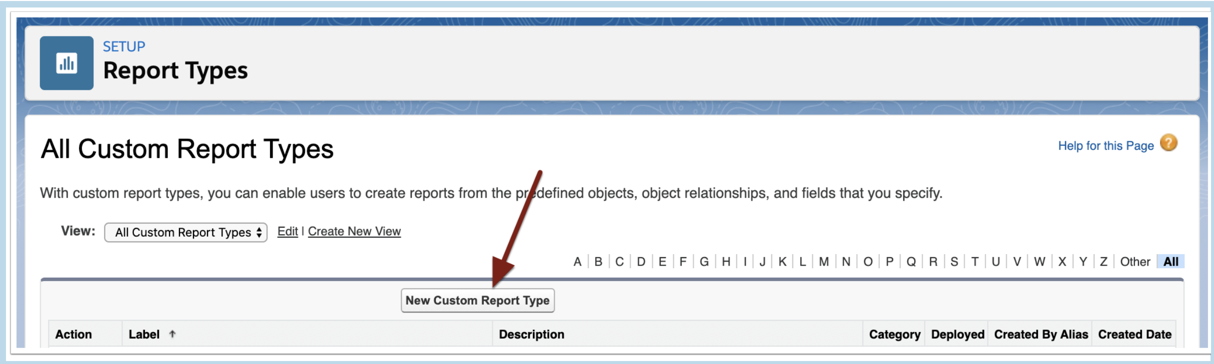
3 Step by Step Instructions

Complete the following steps to create your report and dashboard.

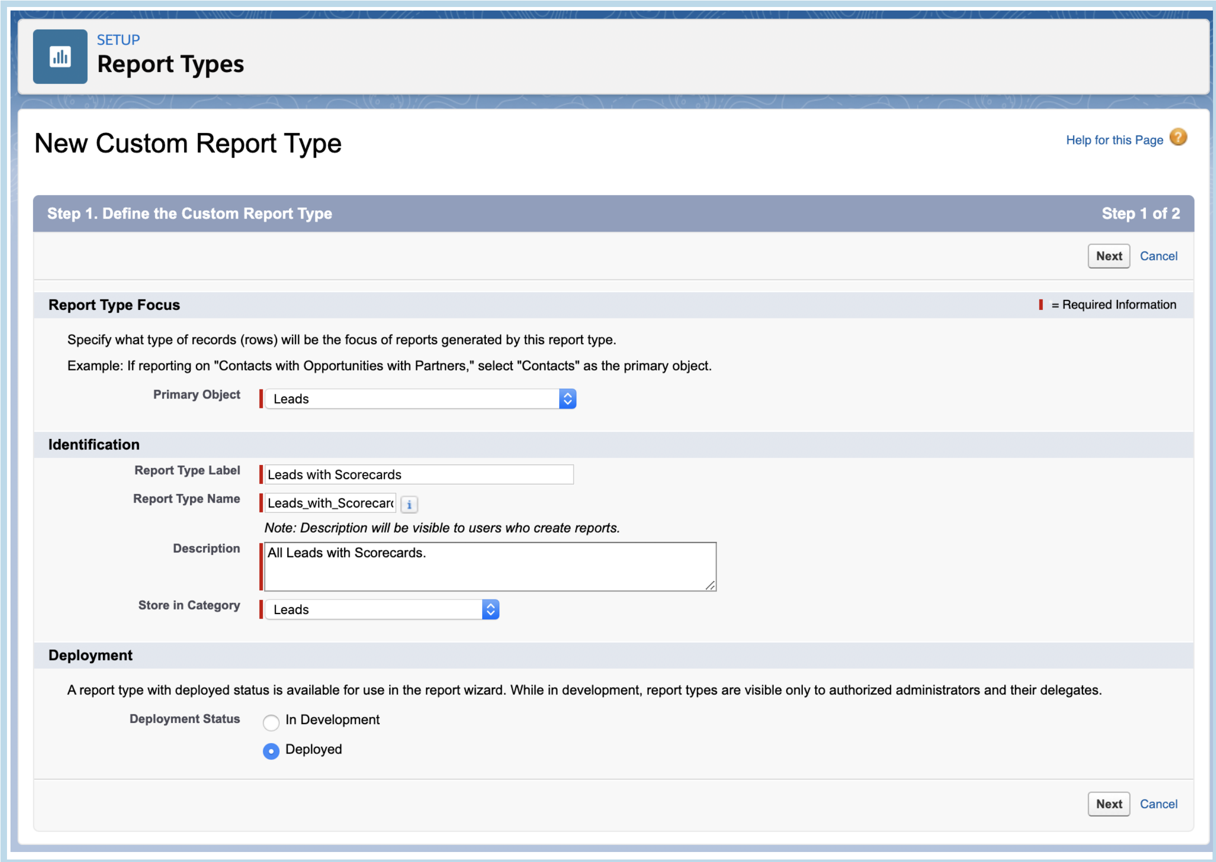
3.1 Step 1: Create a Custom Report Type

A Custom Report Type defines the records and fields that are available when creating reports. In this step you will create a Custom Report Type called *`Leads with Scorecards`* so that we can report on the qualification status of Leads using their attached Scorecards.

From **`Setup`** enter `Report Types` in the **`Quick Find`** box, then click on the **`Report Types`** link. In the **`Report Types`** list view, click the **`New Custom Report Type`** button.



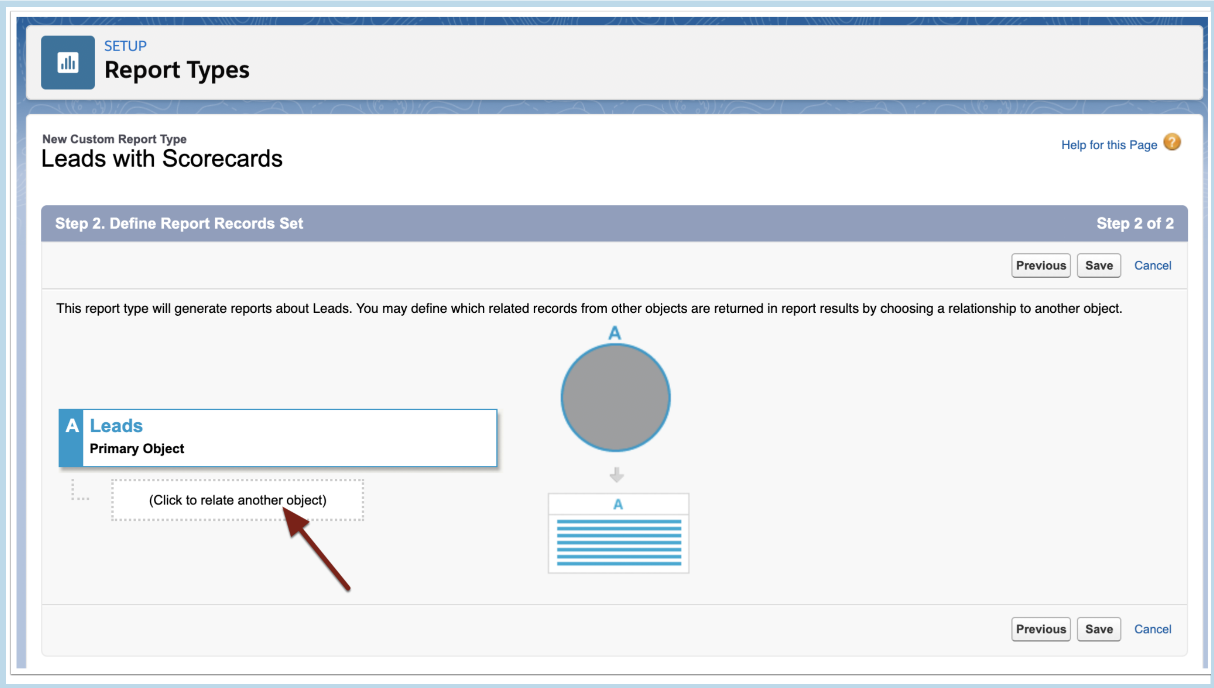
This launches the **`New Custom Report Type`** wizard and displays step 1 of 2.



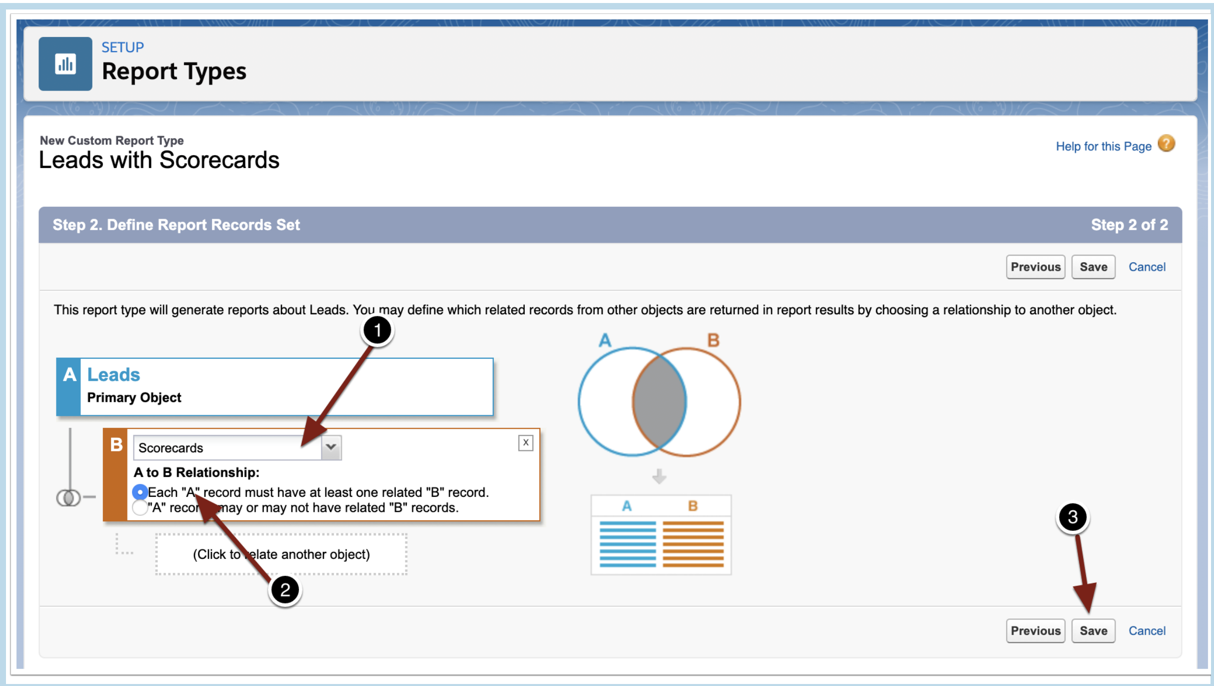
In **`Step 1. Define the Custom Report Type`** of the **`New Custom Report Type`** wizard, enter the following information then click the **`Next`** button:

Field	Value
`Primary Object`	Select the **`Leads`** object.
`Report Type Label`	`Leads with Scorecards`
`Report Type Name`	Keep the auto populated value.
`Description`	`All Leads with Scorecards.`
`Store in Category`	Select the **`Leads`** category.
`Deployment Status`	Select **`Deployed`**.

In **Step 2. Define Report Records Set** of the **New Custom Report Type** wizard click **(Click to relate another object)**.



You can then define the child object.



Referring to the above, perform the following steps:

1. Select **Scorecards** from the **--Select Object--** picklist.

2. Select the **`Each "A" record must have at least one related "B" record.`** Option as we only want to report on Leads that have Scorecards attached.
3. Click the **`Save`** button.

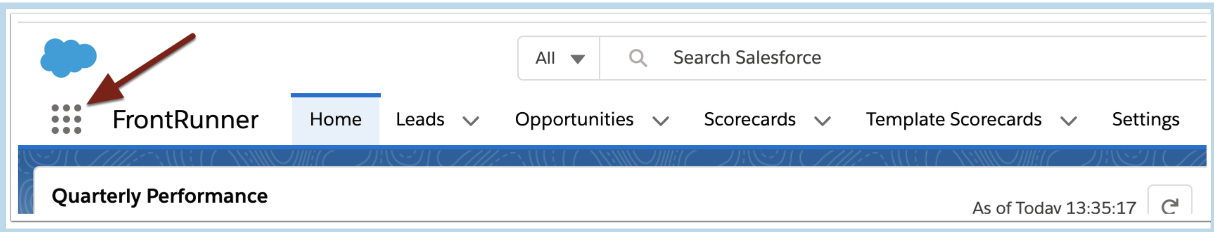
You have now created the Custom Report Type that you need to create the reports for this guide.

3.2 Step 2: Create the Report

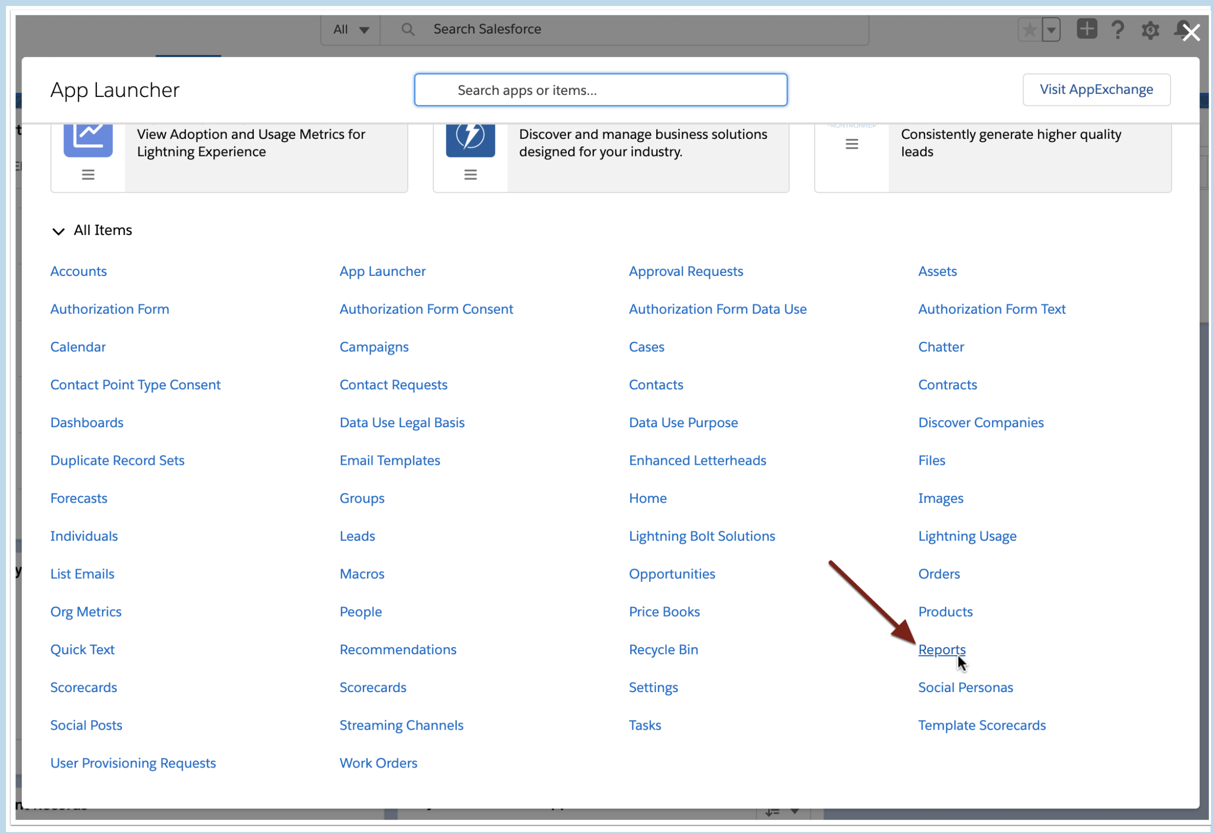
In this step you will use Report Builder to build a report using the **`Leads and Scorecards`** Custom Report Type.

> ***Note***: *For more information about Report Builder, please refer to the Salesforce documentation at: https://developer.salesforce.com/docs/atlas.en-us.salesforce_report_builder_impl_guide.meta/salesforce_report_builder_impl_guide/report_builder_impl_guide.htm.*

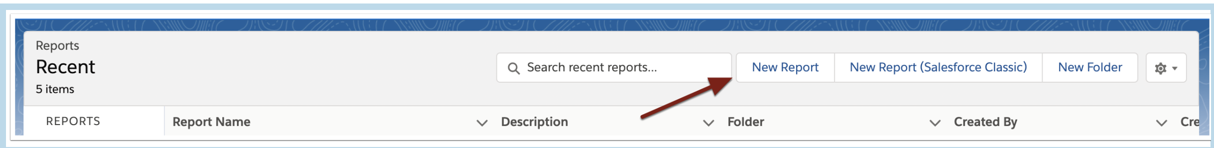
Open the App Launcher by clicking the icon on the left side of the navigation bar.



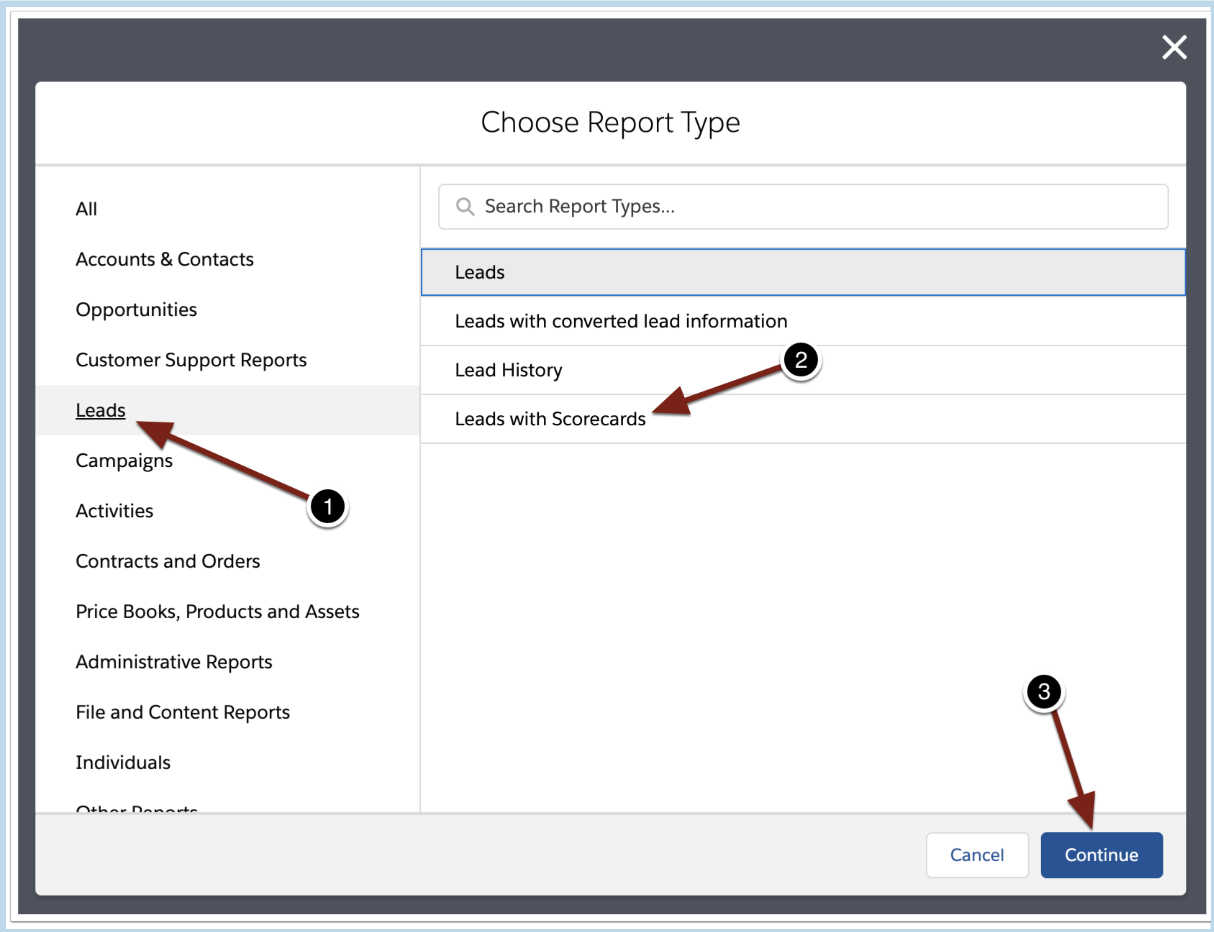
In the **App Launcher** scroll down and click the **Reports** link.



Click the **New Report** button.



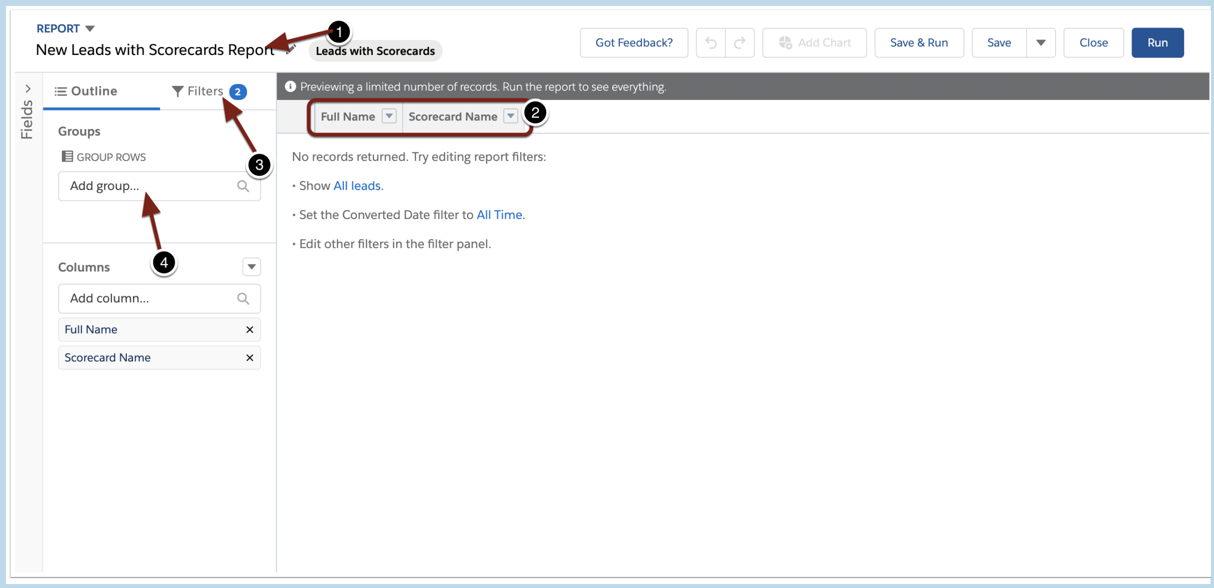
The **Choose Report Type** window is displayed.



Perform the following steps:

1. Select the **Leads** Report Type Category.
2. Select the **Leads with Scorecards** Report Type.
3. Click the **Continue** button.

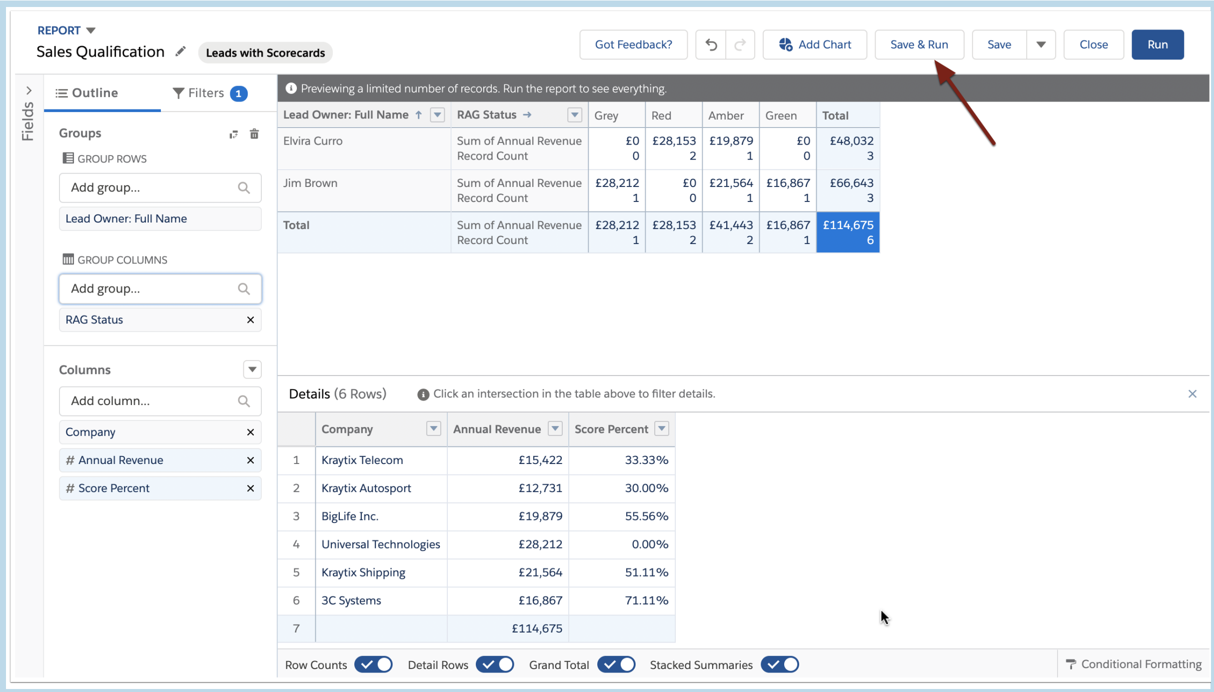
The **Report Builder** should look similar to the following:



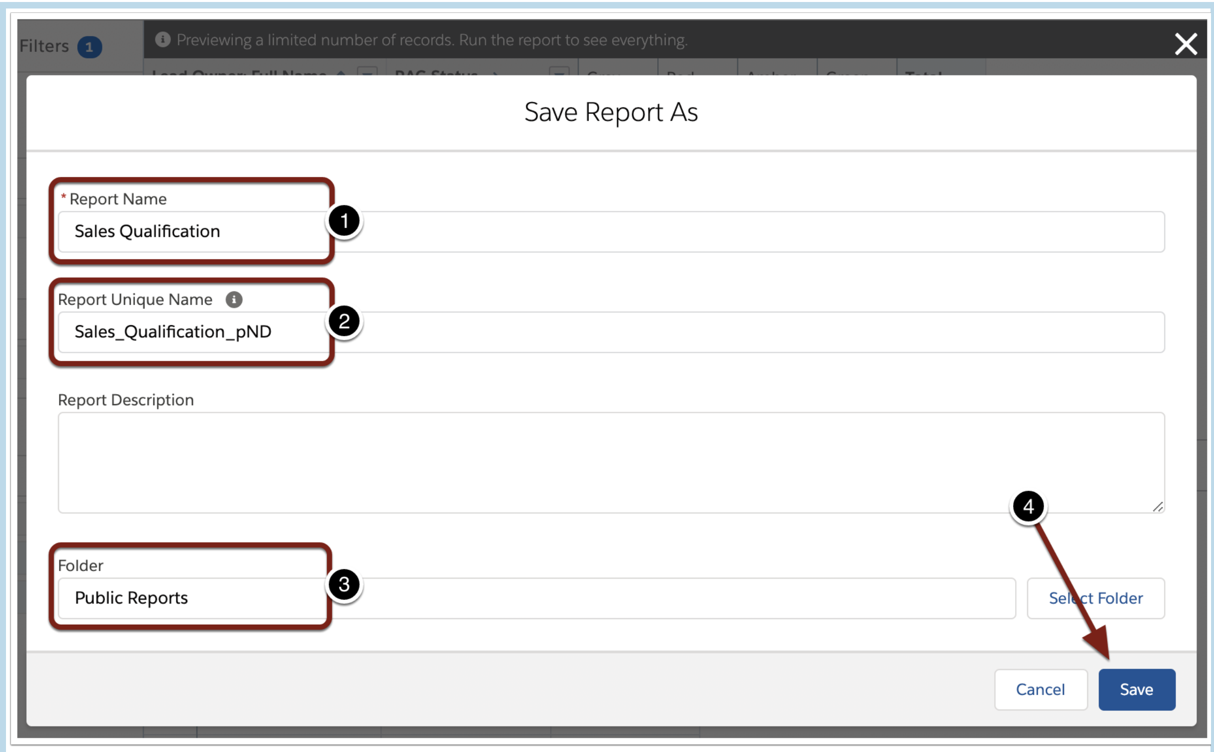
Perform the following steps:

1. Change the report name to `Sales Qualification`.
2. Set the report columns to:
   - **`Lead Owner: Full Name`**
   - **`Company`**
   - **`Annual Revenue`**
   - **`Score Percent`**
   - **`RAG Status`**
3. Set the filters to:
   - **`Show Me: All Leads`**
   - **`Created Data: All Time`**
   - **`Converted: equals False`**
4. Add `Lead Owner: Full Name` to **`GROUP ROWS`**
5. Add `RAG Status` to **`GROUP COLUMNS`**

The **`Report Builder`** should now look like the following:



Click the **`Save & Run`** button. The **`Save Report As`** window is displayed.

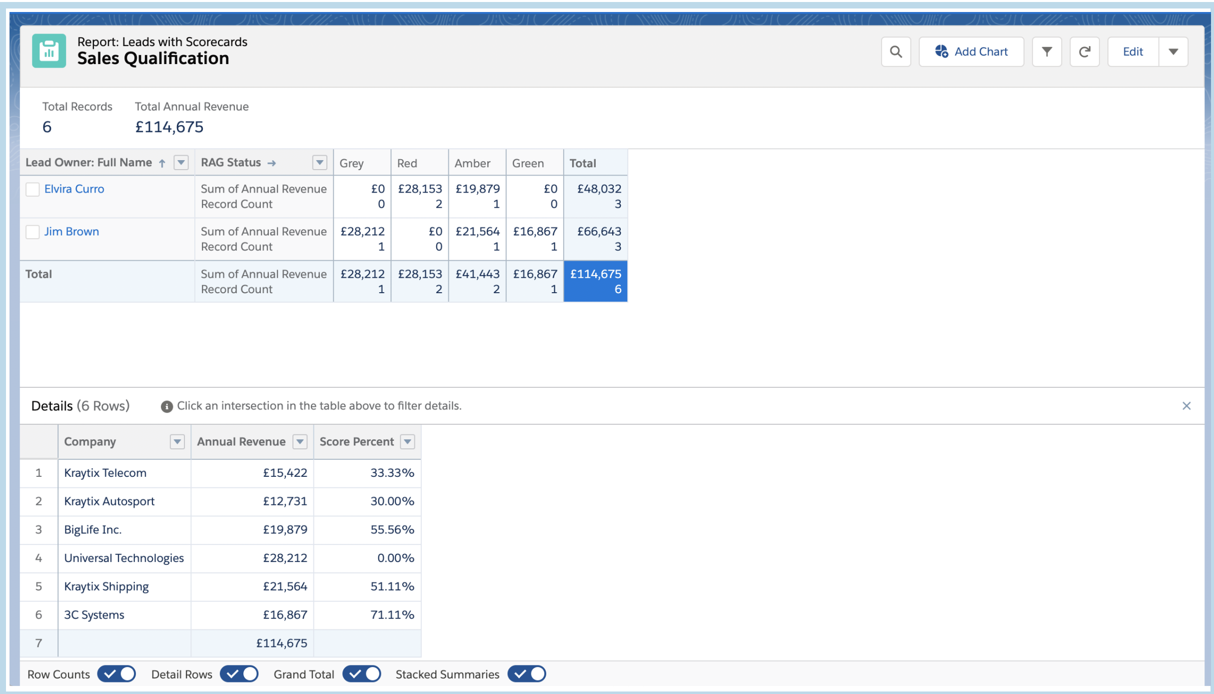


Perform the following steps:

1. Enter `Sales Qualification` for the **`Report Name`**.

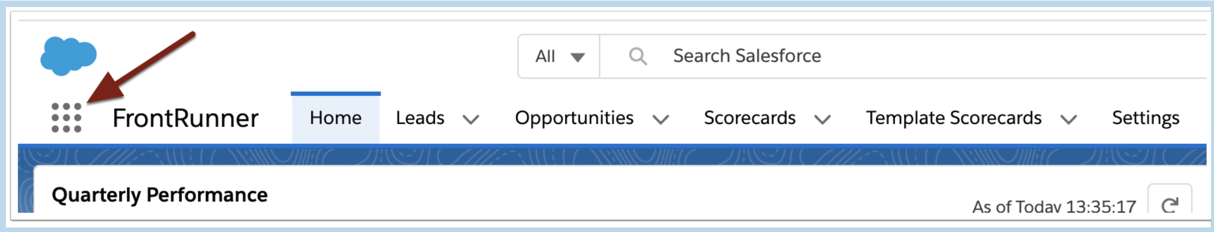
2. Leave the **`Report Unique Name`** as the auto populated value.
3. Select **`Public Reports`** for the **`Folder`**.
4. Click the **Save** button.

You have now created the following report that will be used for your dashboard.

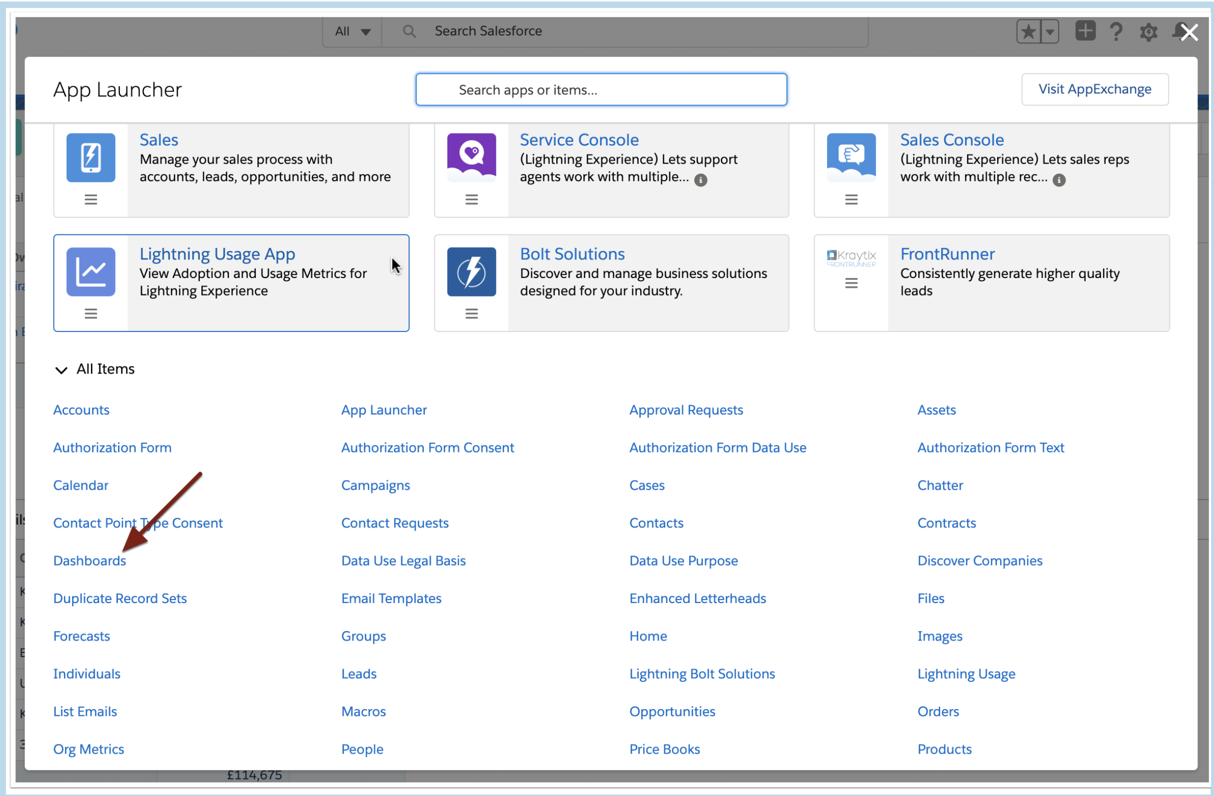


3.3 Step 3: Create the Dashboard

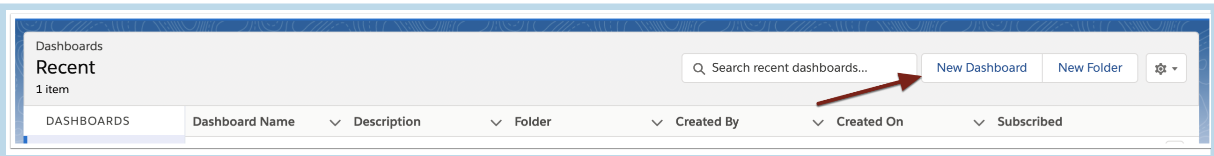
In this step you will create a dashboard that uses the **`Sales Qualification`** report. Open the App Launcher by clicking the icon on the left side of the navigation bar.



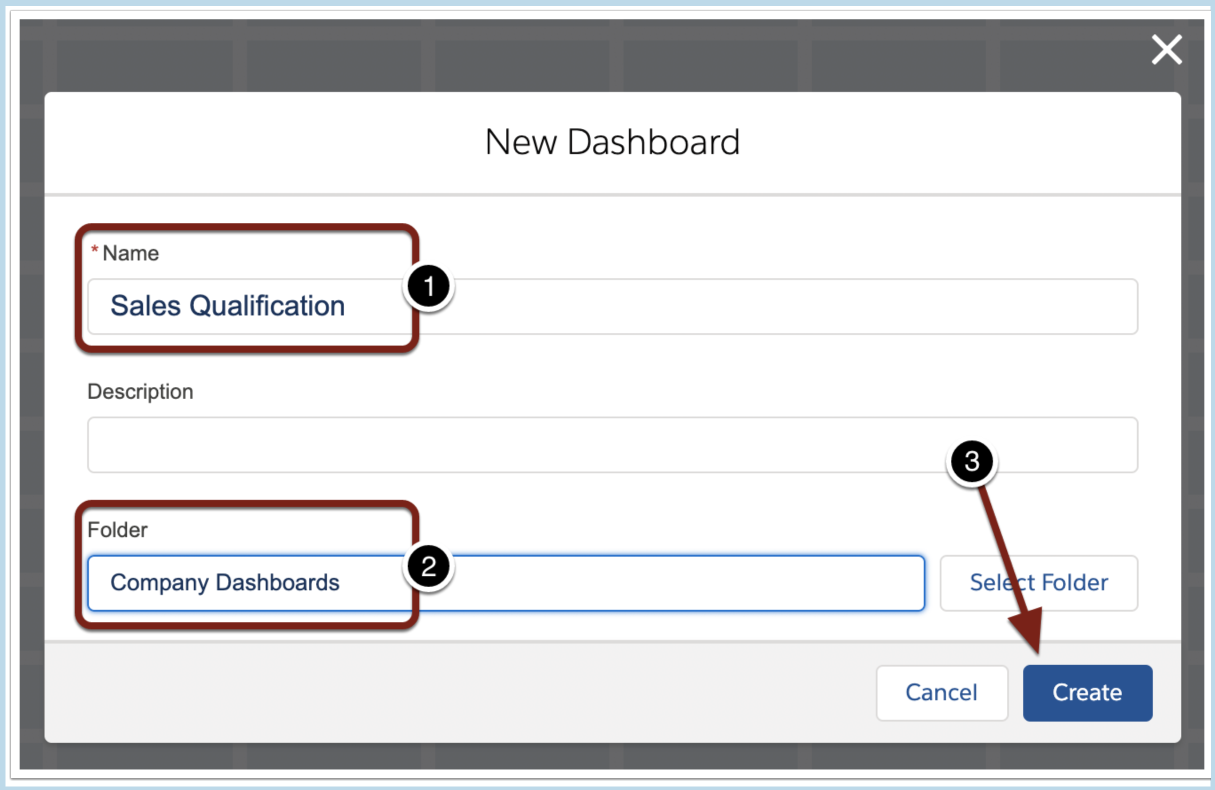
In the **`App Launcher`** scroll down and click the **`Dashboards`** link.



Click the **`New Dashboard`** button.



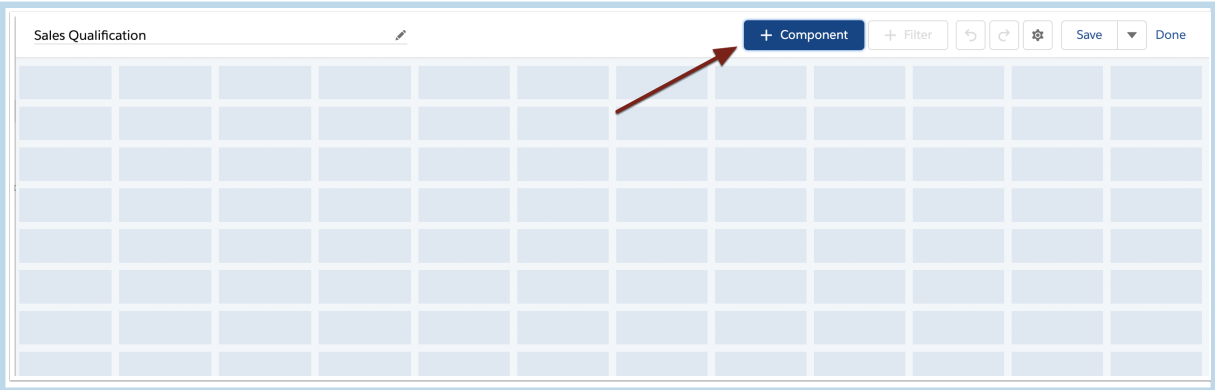
The **New Dashboard** window is displayed.



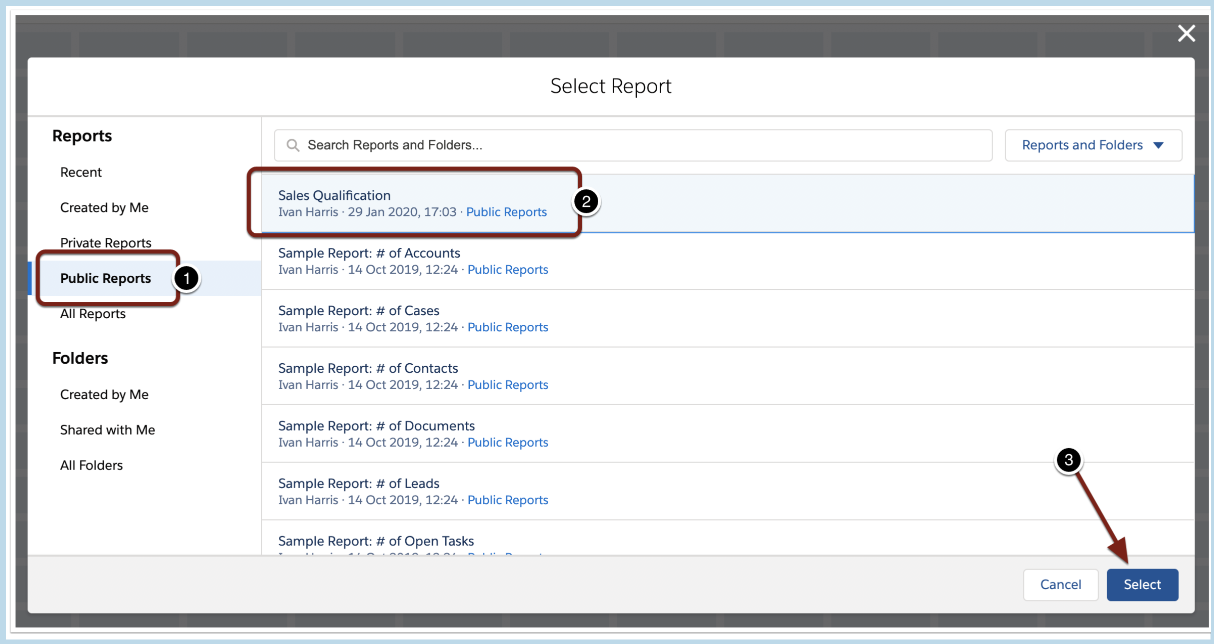
Perform the following steps:

1. Enter `Sales Qualification` for the **Name**.
2. Select **Company Dashboards** for the **Folder**.
3. Click the **Create** button.

You will now be adding five components to the dashboard that all use the **Sales Qualification** report. Click the **+ Component button**.



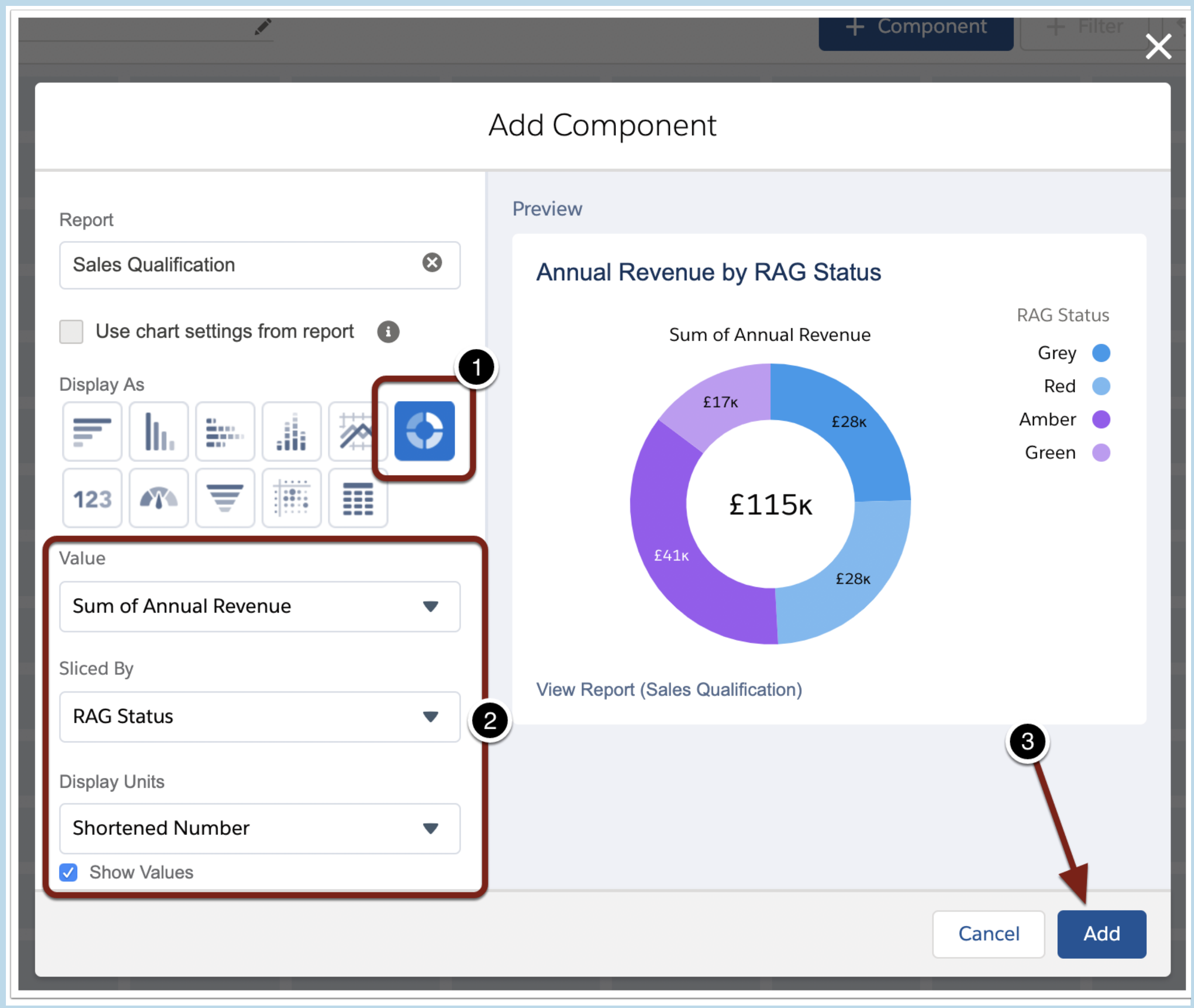
The **Select Report** window is displayed.



Perform the following steps:

1. Select the **Public Reports** folder.
2. Select the **Sales Qualification** report.
3. Click the **Select** button.

The **`Add Component`** window is displayed.



Perform the following steps for Component 1 of 5:

1. Select the **`Donut Chart`** type for **`Display As`**.
2. Enter the information in the table below into the fields (you will need to scroll down to see some of them).
3. Click the **Add** button.

Field	Value
`Sliced By`	Select **`RAG Status`**
`Title`	`Annual Revenue by RAG Status`
`Component Theme`	Select **`Dark`**

Repeat the above for the following components. Component 2 of 5:

Field	Value

`Display As`	Select **`Horizontal Bar Chart`**
`Y-axis`	**`RAG Status`** (delete **`Lead Owner: Full Name`** if it is shown)
`X-axis`	Select **`Record Count`**
`Title`	`Scorecard Count by RAG Status`
`Component Theme`	Select **`Dark`**

Component 3 of 5:

Field	Value
`Display As`	Select **`Funnel Chart`**
`Color By`	Select **`RAG Status`**
`Show Percentages`	Select
`Title`	`Funnel by RAG Status`
`Component Theme`	Select **`Dark`**

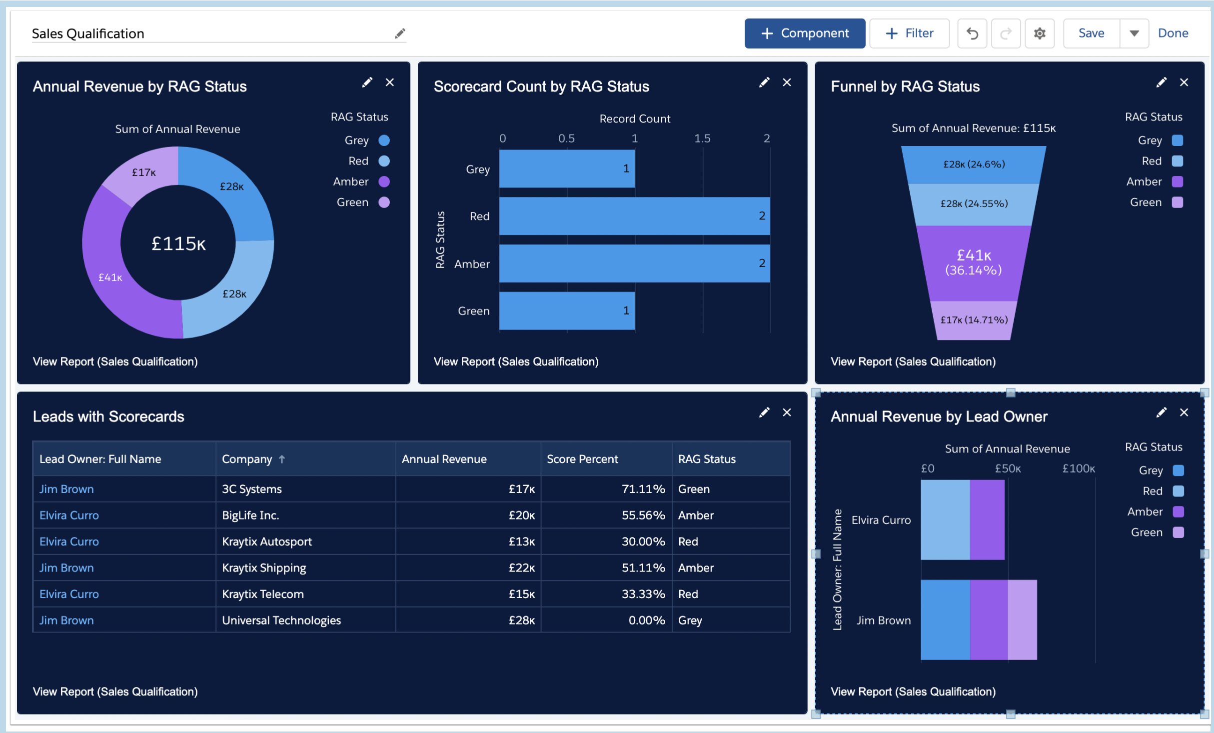
Component 4 of 5:

Field	Value
`Display As`	Select **`Lightning Table`**
`Columns`	**`Lead Owner: Full Name`** **`Company`** **`Annual Revenue`** **`Score Percent`** **`RAG Status`**
`Title`	`Leads with Scorecards`
`Component Theme`	Select **`Dark`**

Component 5 of 5:

Field	Value
`Display As`	Select **`Stacked Horizontal Bar Chart`**
`Title`	`Annual Revenue by Lead Owner`
`Component Theme`	Select **`Dark`**

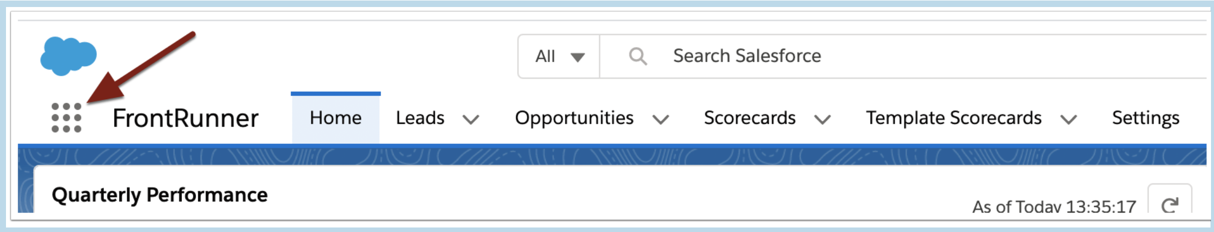
Layout your components to resemble the following:



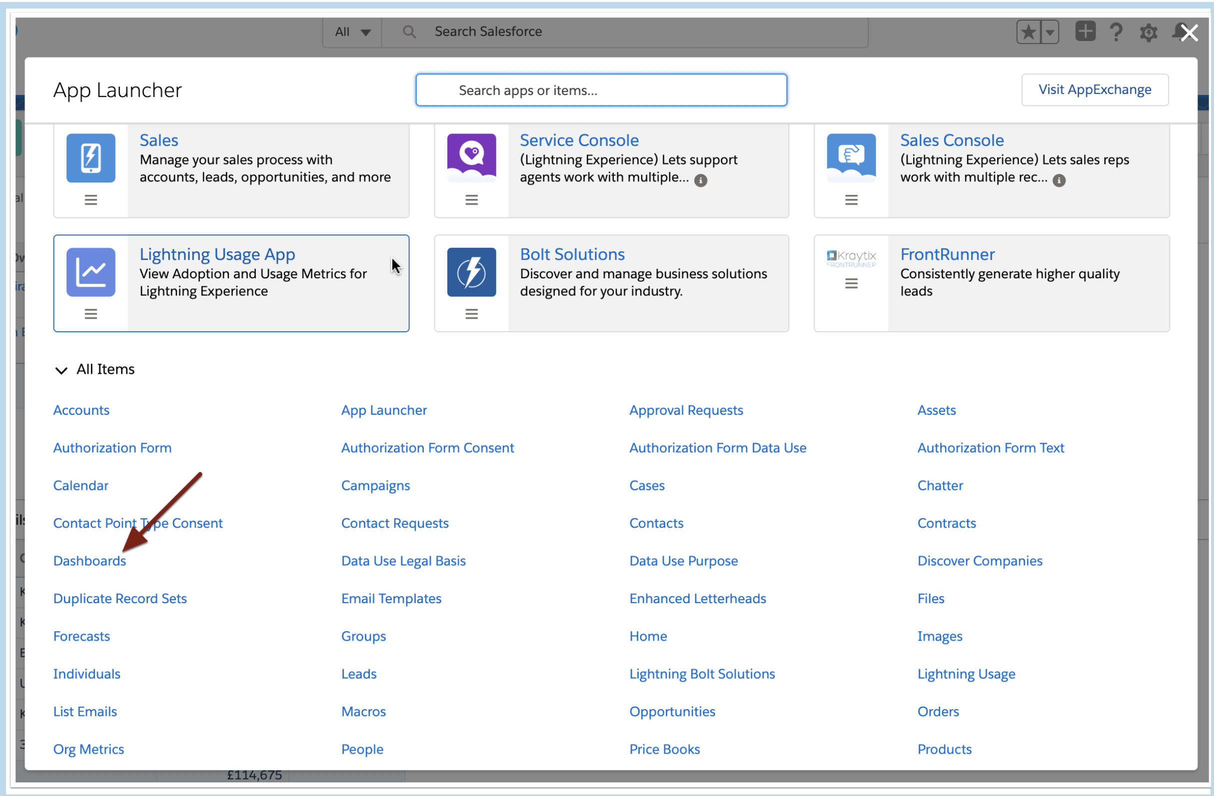
Click the **Save** button then the **Done** button to view your completed dashboard.

3.3 Step 4: Validation

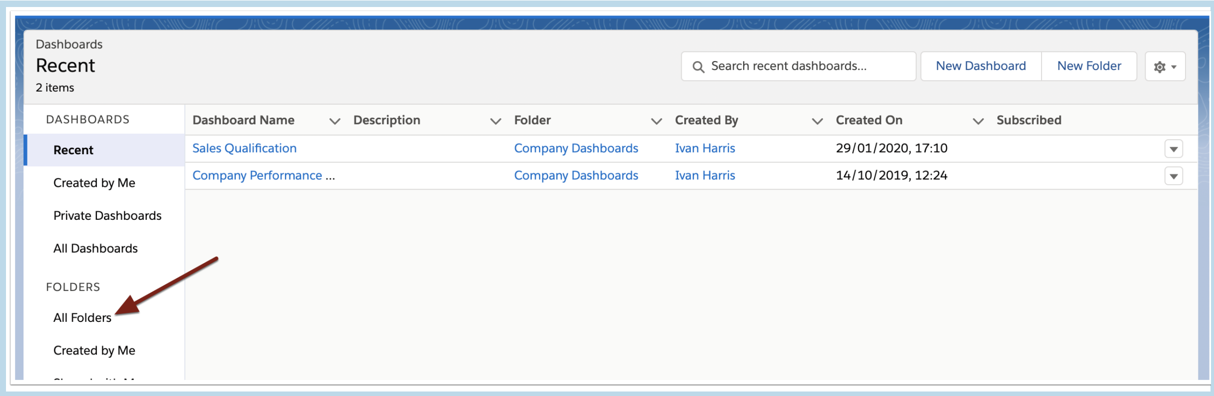
To view the dashboard, users open the App Launcher by clicking the icon on the left side of the navigation bar.



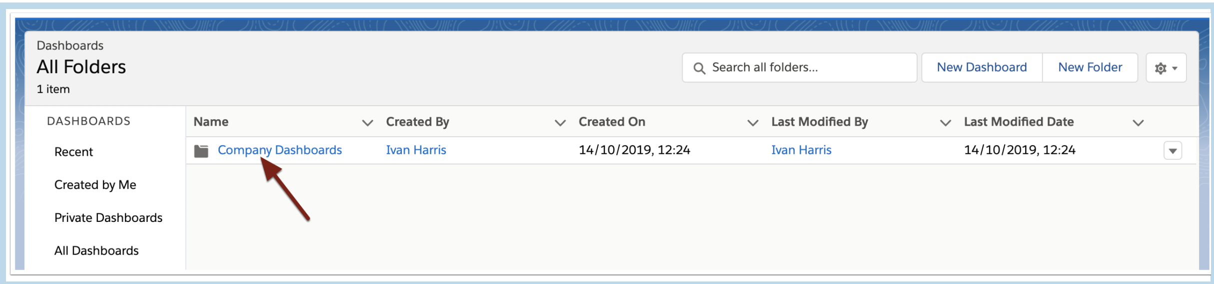
In the **App Launcher** scroll down and click the **Dashboards** link.



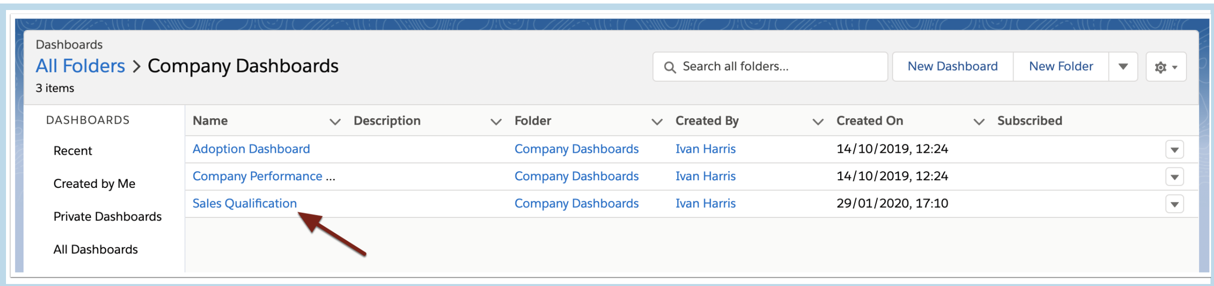
Click the **`All Folders`** link.



Click the **`Company Dashboards`** folder.



Click the **`Sales Qualification`** dashboard.



The dashboard will look like this: