



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

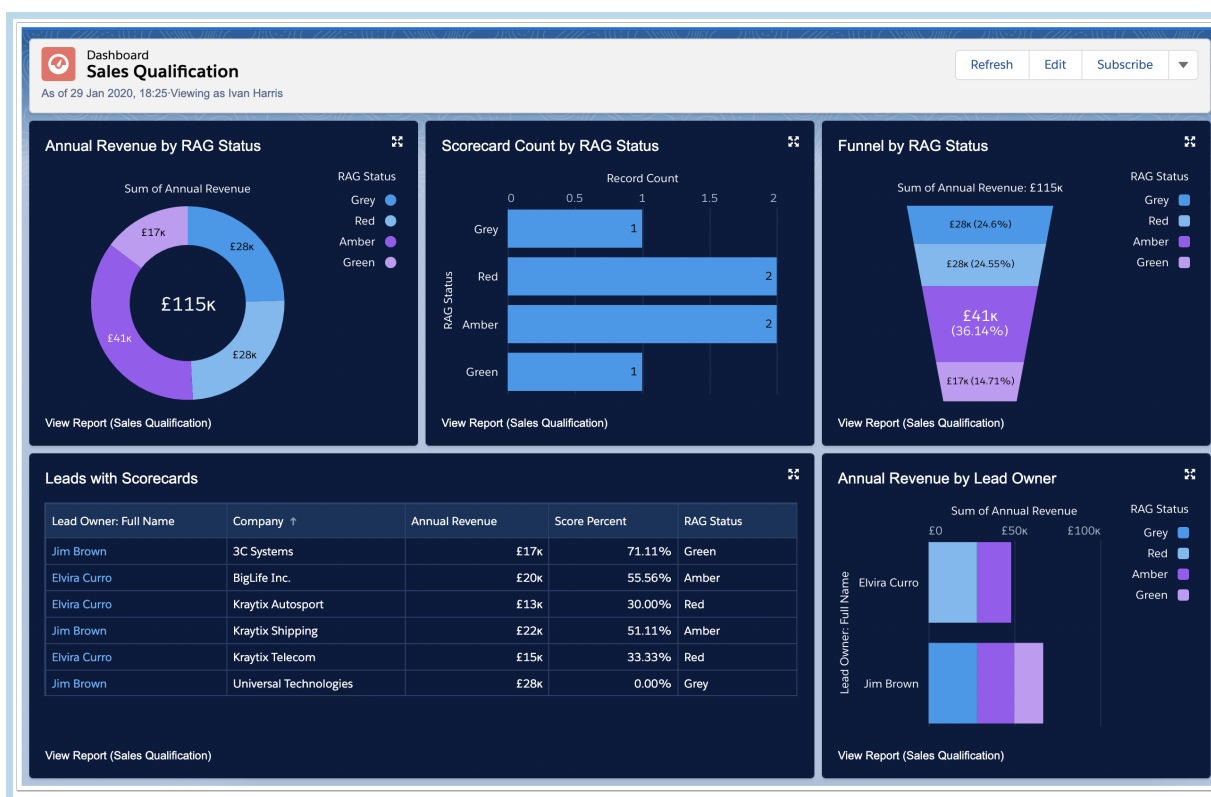
This guide will show you how to create an example FrontRunner report and a dashboard. You will then be able to modify them or create your own.



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:



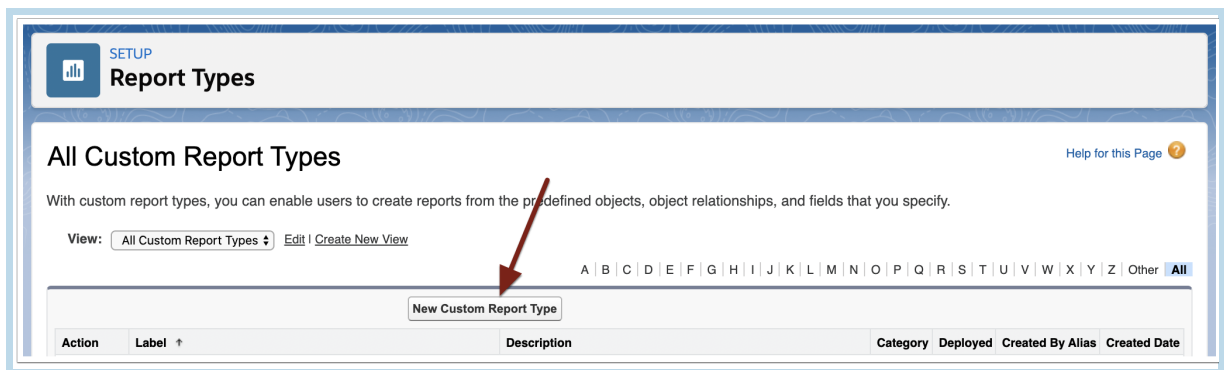
3 Step by Step Instructions

Complete the following steps to create your report and dashboard.

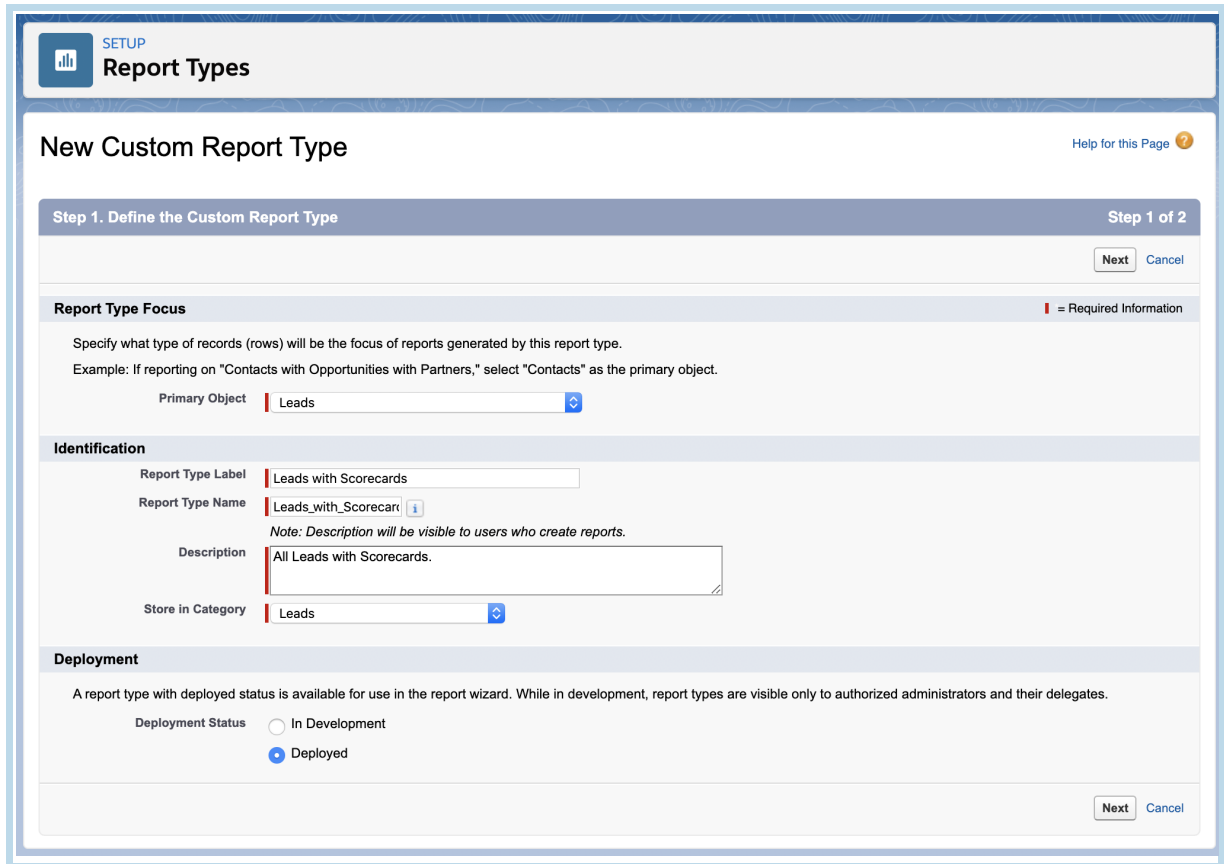
3.1 Step 1: Create a Custom Report Type

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.



SETUP
Report Types

New Custom Report Type [Help for this Page](#)

Step 1. Define the Custom Report Type **Step 1 of 2**

Report Type Focus ! = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object ! Leads

Identification

Report Type Label ! Leads with Scorecards

Report Type Name ! Leads_with_Scorecards

Description ! All Leads with Scorecards.

Note: Description will be visible to users who create reports.

Store in Category ! Leads

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development ☒ Deployed

Next **Cancel**

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)**.

The screenshot shows the 'Step 2. Define Report Records Set' wizard for 'Leads with Scorecards'. The primary object is 'Leads'. A dashed box labeled '(Click to relate another object)' is shown with a red arrow pointing to it. A diagram on the right shows a circle 'A' with a downward arrow pointing to a table icon labeled 'A'. Navigation buttons 'Previous', 'Save', and 'Cancel' are at the bottom right.

You can then define the child object.

The screenshot shows the 'Step 2. Define Report Records Set' wizard for 'Leads with Scorecards' with the child object defined. The primary object is 'Leads' and the child object is 'Scorecards'. A red arrow labeled '1' points to the 'Scorecards' dropdown. A red arrow labeled '2' points to the 'A to B Relationship' section, which contains a radio button and text: 'Each "A" record must have at least one related "B" record. "A" records may or may not have related "B" records.' A diagram on the right shows two overlapping circles 'A' and 'B' with a downward arrow pointing to a table icon labeled 'A' and 'B'. A red arrow labeled '3' points to the 'Save' button. Navigation buttons 'Previous', 'Save', and 'Cancel' are at the bottom right.

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.

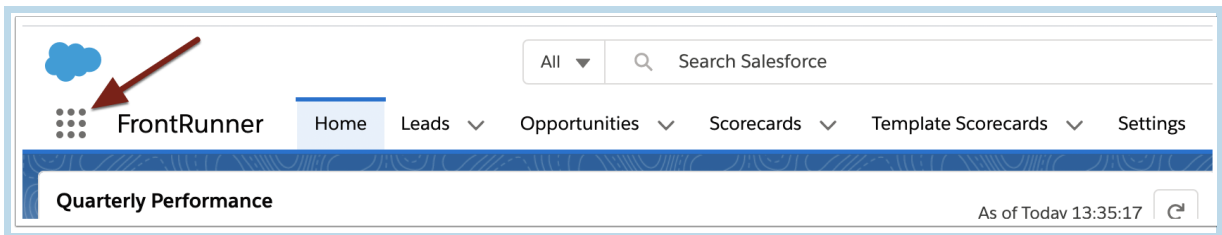
3.2 Step 2: Create the Report

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

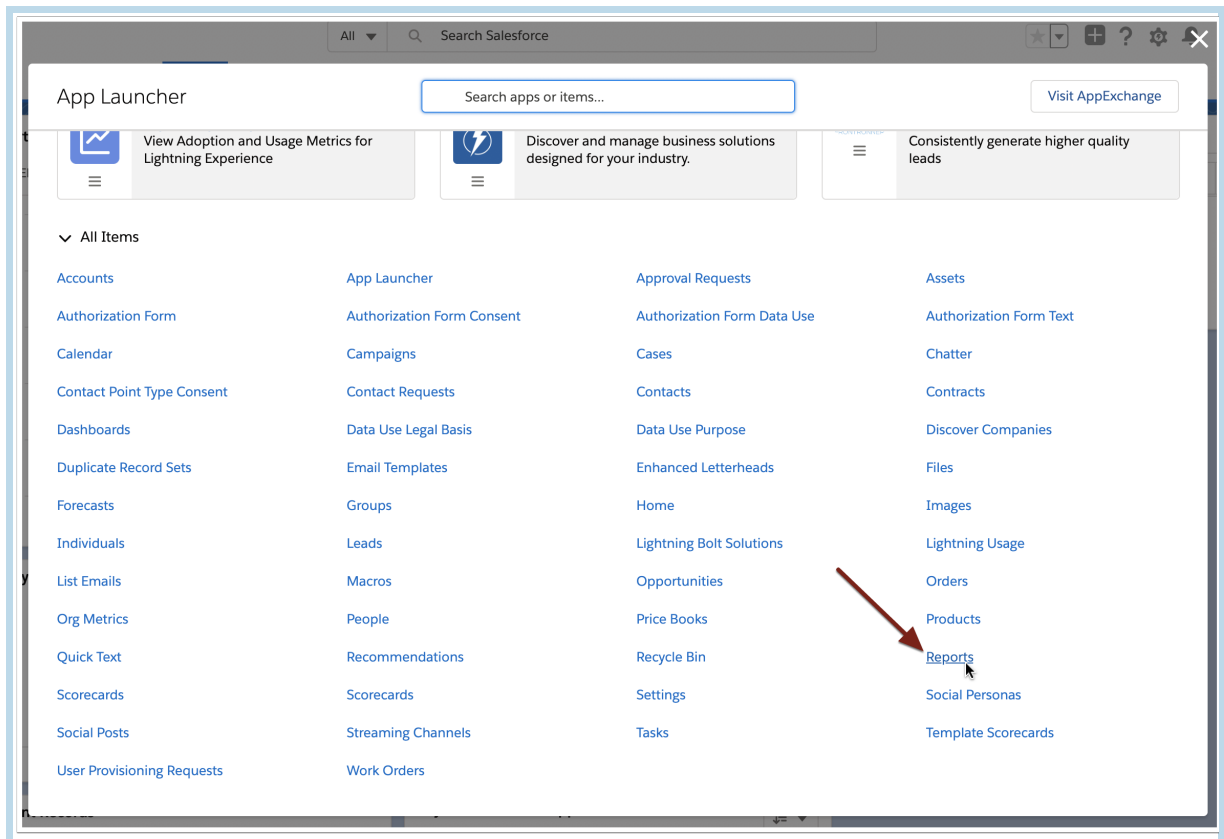


Note: For more information about Report Builder, please refer to the Salesforce documentation at:
[https://developer.salesforce.com/docs/atlas.en-us.salesforce_report_builder_impl_guide.meta/salesforce_report_builder_impl_guide/report_builder_impl_guide.htm](https://developer.salesforce.com/docs/atlas.en-us.salesforce_report_builder_impl_guide/meta/salesforce_re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

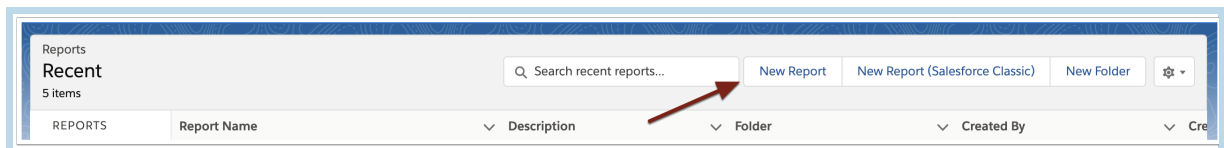
Open the App Launcher by clicking the  icon on the left side of the navigation bar.



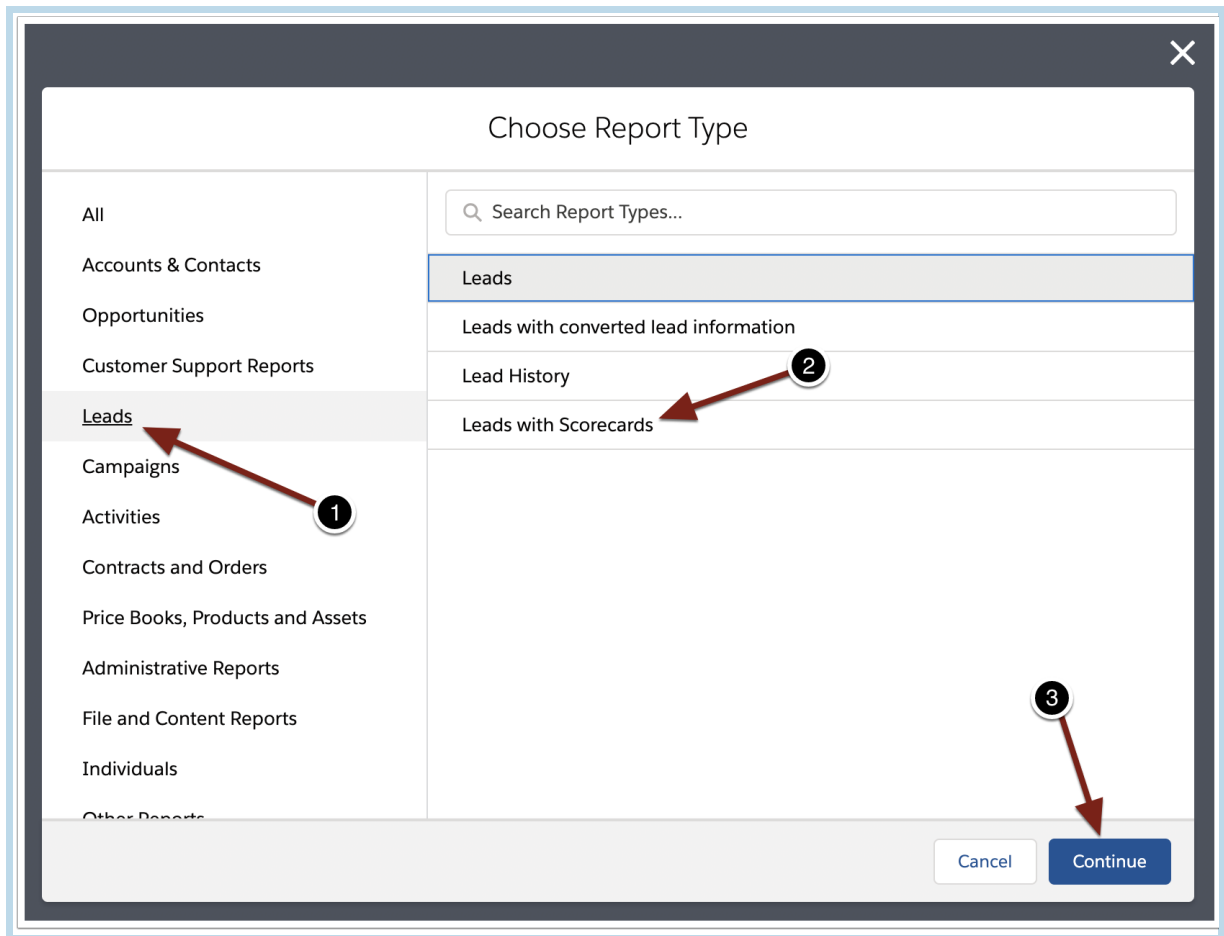
In the **App Launcher** scroll down and click the **Reports** link.



Click the **New Report** button.



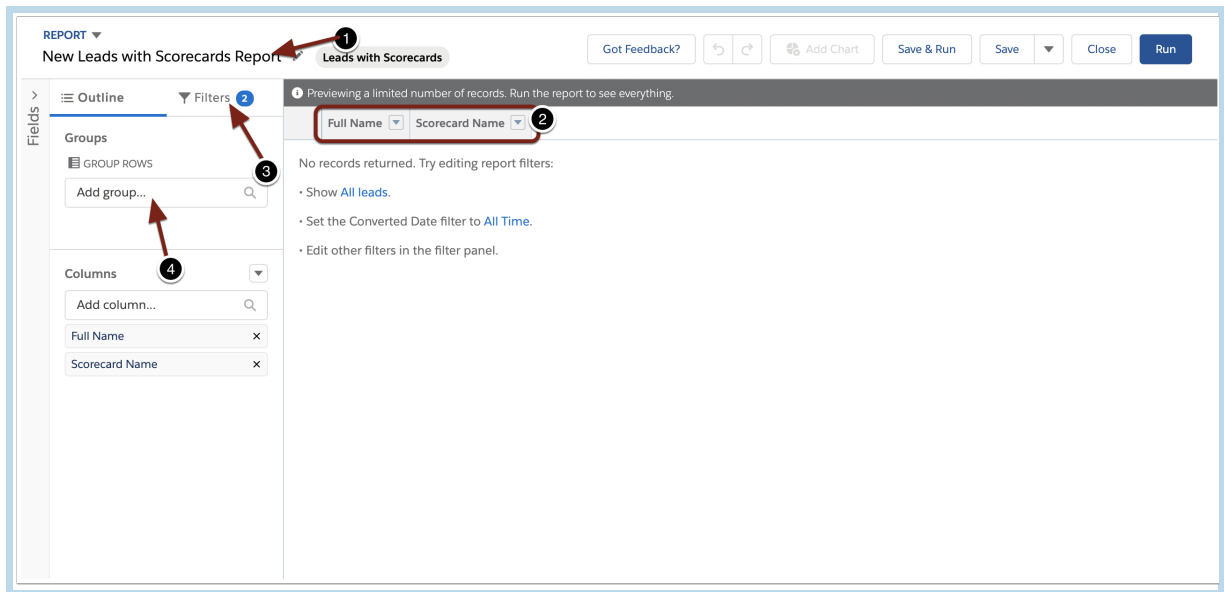
The **Choose Report Type** window is displayed.



Perform the following steps:

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

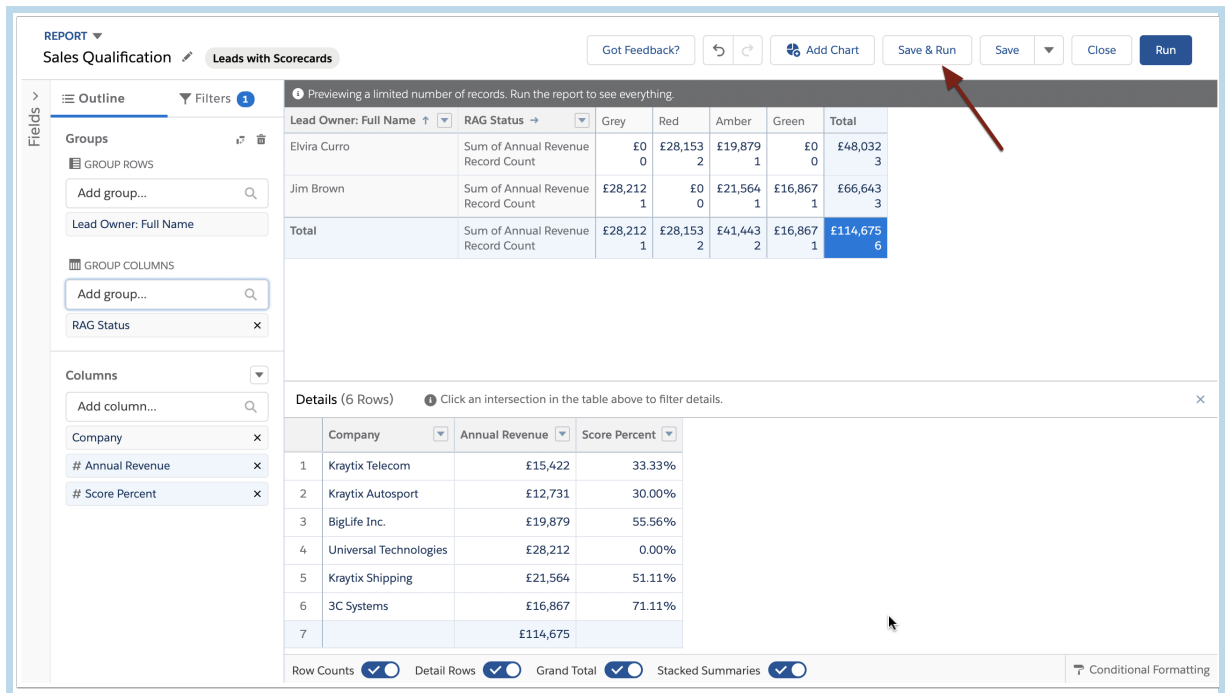
The **Report Builder** should look similar to the following:



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:



The screenshot shows the Report Builder interface. On the left, there's a sidebar with 'Fields' and 'Filters' sections. The main area displays a report titled 'Sales Qualification' with a table of data. A red arrow points to the 'Save & Run' button in the top right corner.

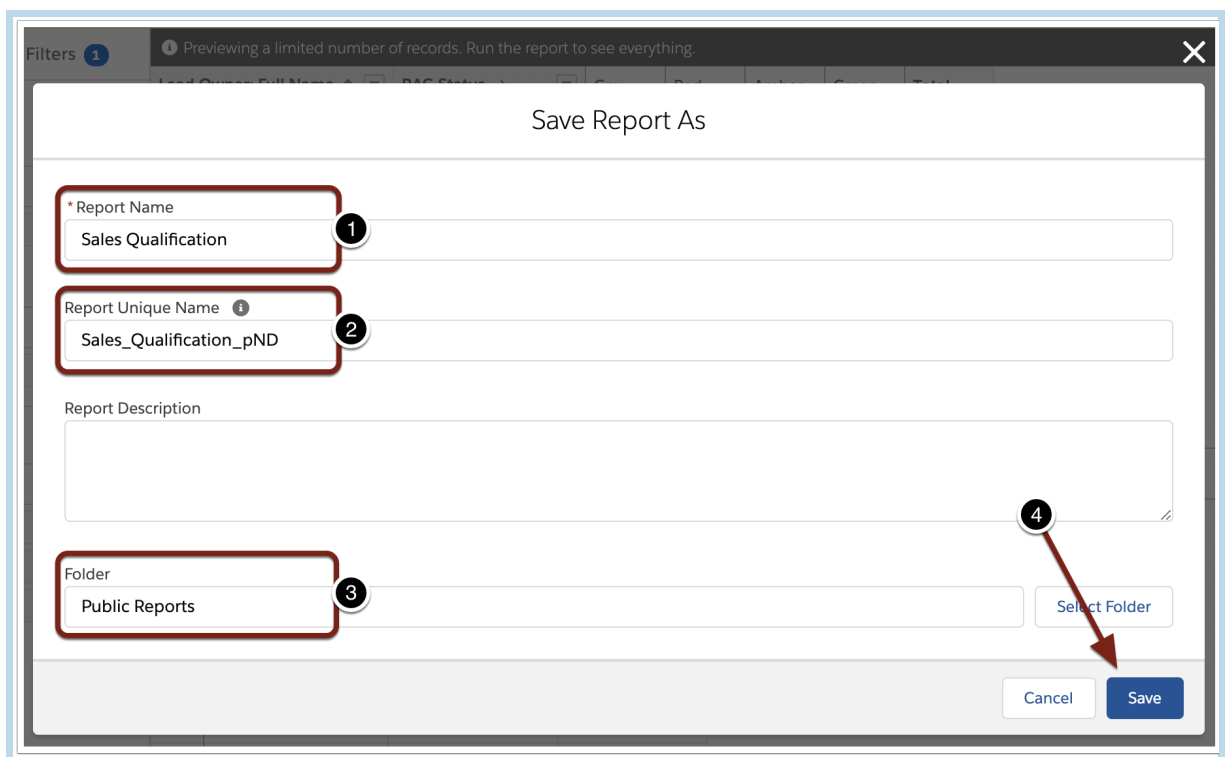
Lead Owner: Full Name	RAG Status	Grey	Red	Amber	Green	Total
Elvira Curro	Sum of Annual Revenue Record Count	£0 0	£28,153 2	£19,879 1	£0 0	£48,032 3
Jim Brown	Sum of Annual Revenue Record Count	£28,212 1	£0 0	£21,564 1	£16,867 1	£66,643 3
Total	Sum of Annual Revenue Record Count	£28,212 1	£28,153 2	£41,443 2	£16,867 1	£114,675 6

Details (6 Rows) Click an intersection in the table above to filter details.

Company	Annual Revenue	Score Percent
1 Kraytix Telecom	£15,422	33.33%
2 Kraytix Autosport	£12,731	30.00%
3 BigLife Inc.	£19,879	55.56%
4 Universal Technologies	£28,212	0.00%
5 Kraytix Shipping	£21,564	51.11%
6 3C Systems	£16,867	71.11%
7	£114,675	

Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒ Conditional Formatting

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



The screenshot shows the 'Save Report As' dialog box. It has four numbered callouts: 1 points to the 'Report Name' field (containing 'Sales Qualification'), 2 points to the 'Report Unique Name' field (containing 'Sales_Qualification_pND'), 3 points to the 'Folder' field (containing 'Public Reports'), and 4 points to the 'Save' button.

Save Report As

* Report Name
Sales Qualification 1

Report Unique Name
Sales_Qualification_pND 2

Report Description

Folder
Public Reports 3

Select Folder

Cancel Save 4

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.


Report: Leads with Scorecards
Sales Qualification

Total Records		Total Annual Revenue						
6		£114,675						
Lead Owner: Full Name	RAG Status	Grey	Red	Amber	Green	Total		
☐ Elvira Curro	Sum of Annual Revenue Record Count	£0 0	£28,153 2	£19,879 1	£0 0	£48,032 3		
☐ Jim Brown	Sum of Annual Revenue Record Count	£28,212 1	£0 0	£21,564 1	£16,867 1	£66,643 3		
Total	Sum of Annual Revenue Record Count	£28,212 1	£28,153 2	£41,443 2	£16,867 1	£114,675 6		

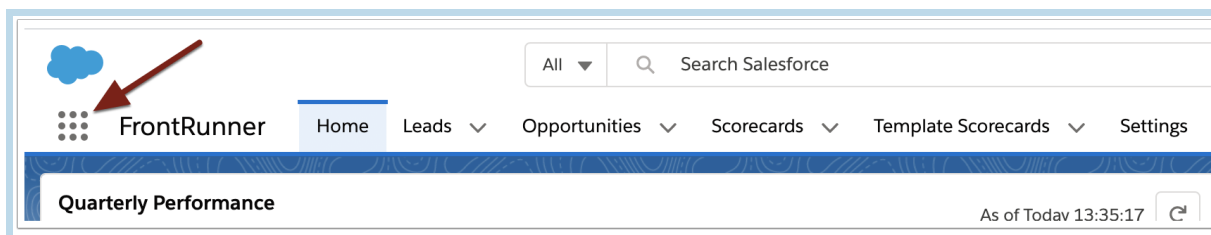
Details (6 Rows)

	Company	Annual Revenue	Score Percent
1	Kraytix Telecom	£15,422	33.33%
2	Kraytix Autosport	£12,731	30.00%
3	BigLife Inc.	£19,879	55.56%
4	Universal Technologies	£28,212	0.00%
5	Kraytix Shipping	£21,564	51.11%
6	3C Systems	£16,867	71.11%
7		£114,675	

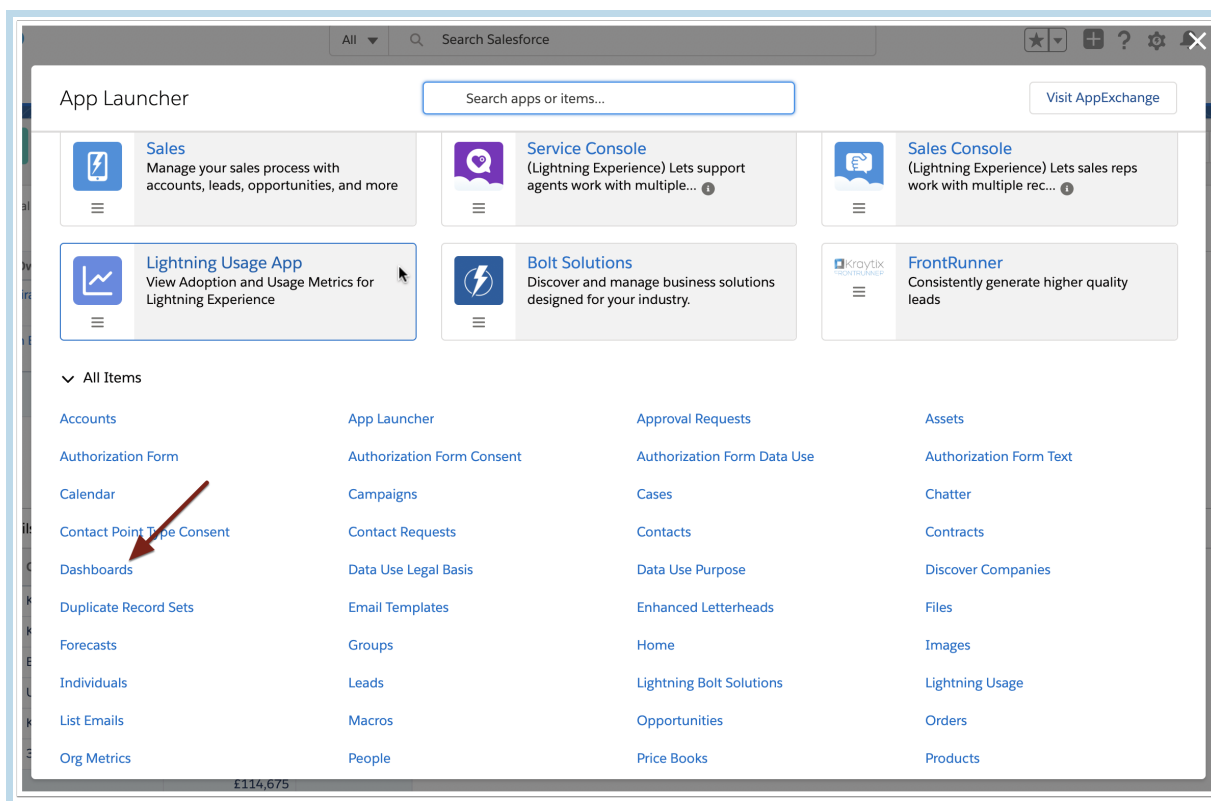
Row Counts ☒
Detail Rows ☒
Grand Total ☒
Stacked Summaries ☒

3.3 Step 3: Create the Dashboard

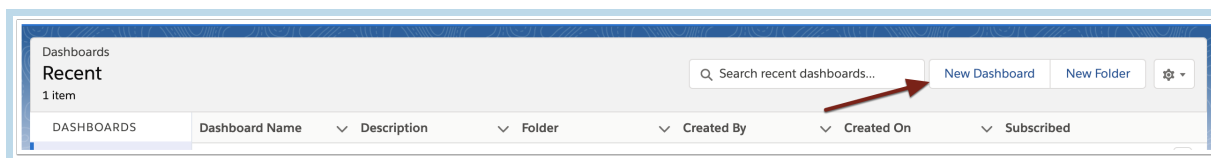
In this step you will create a dashboard that uses the **Sales Qualification** report. Open the App Launcher by clicking the  icon on the left side of the navigation bar.



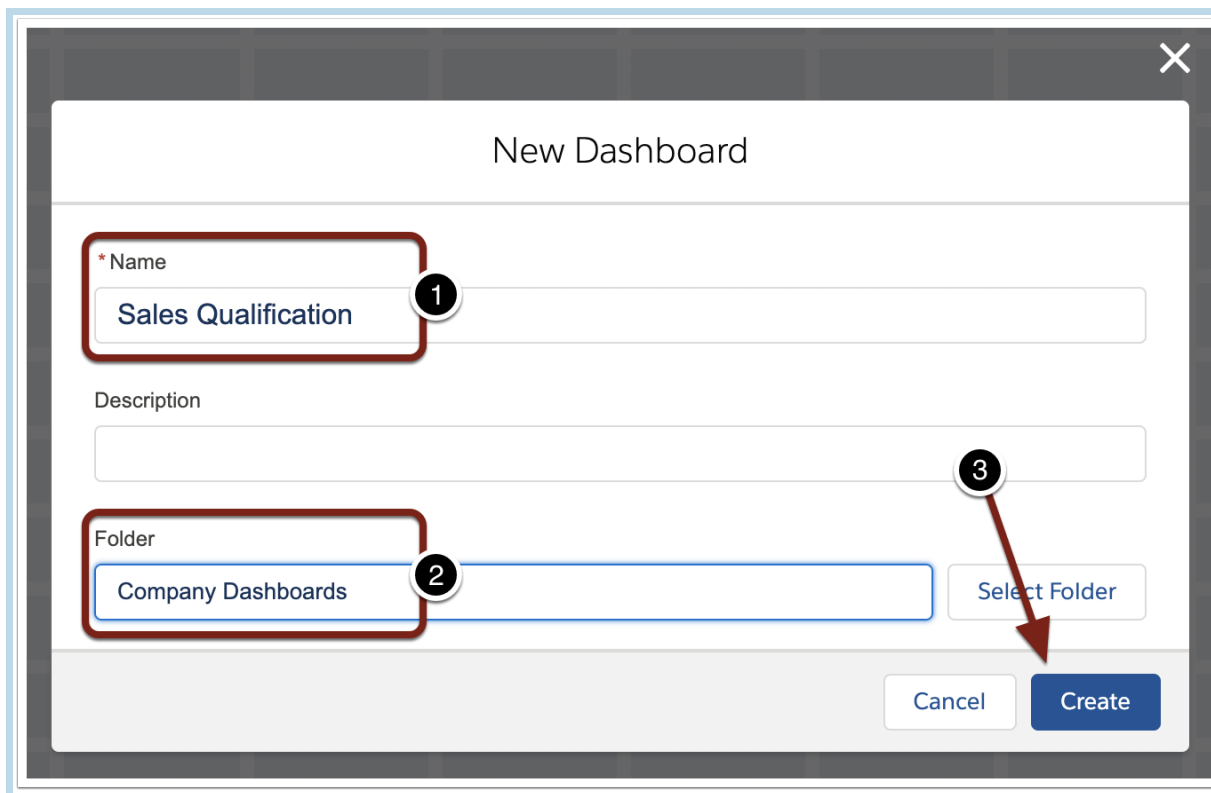
In the **App Launcher** scroll down and click the **Dashboards** link.



Click the **New Dashboard** button.



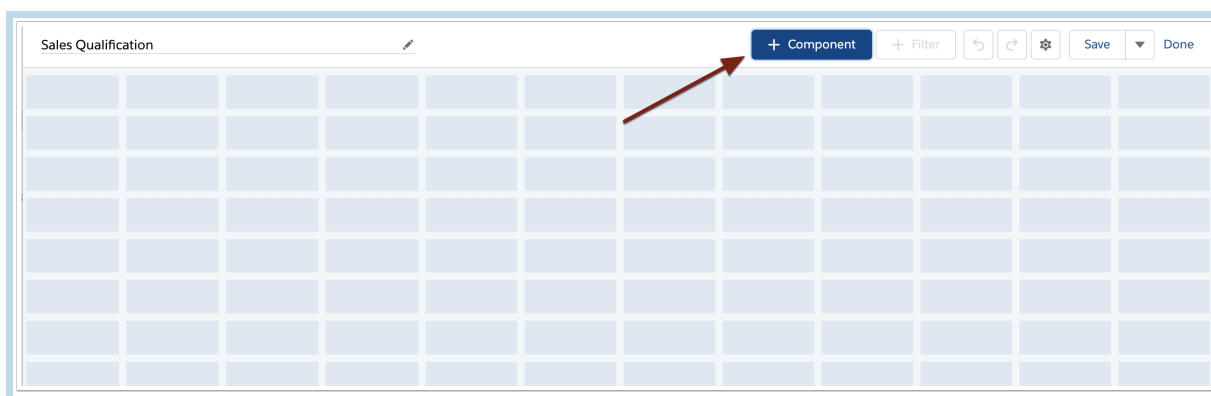
The **New Dashboard** window is displayed.



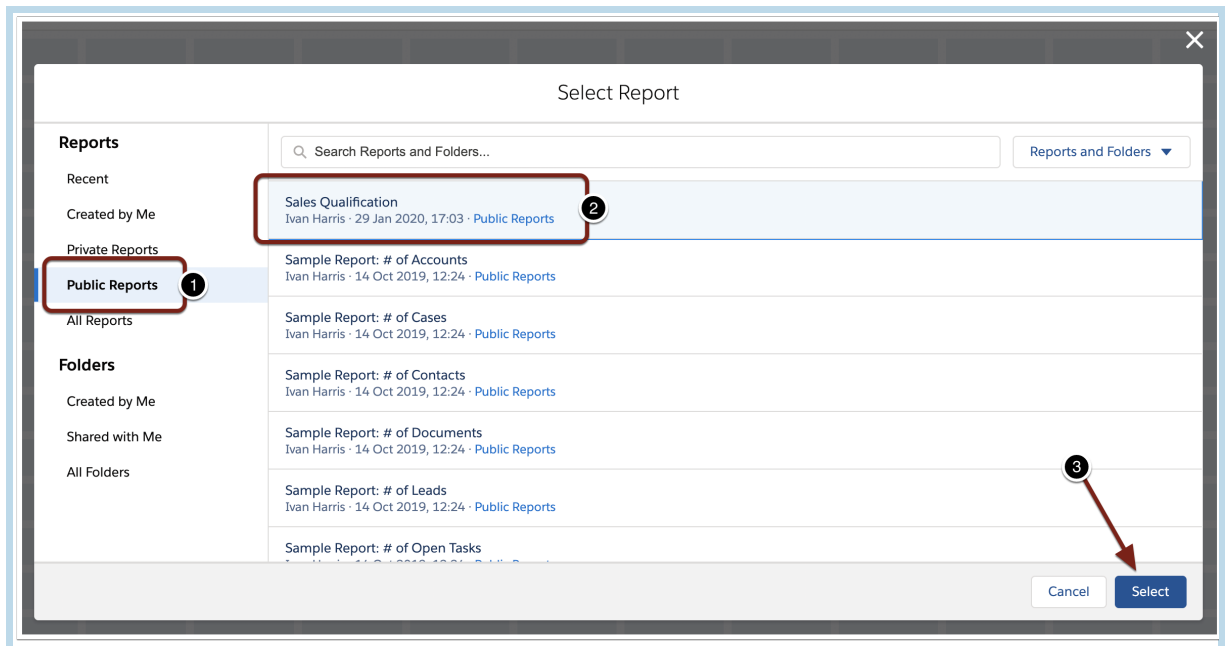
Perform the following steps:

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.



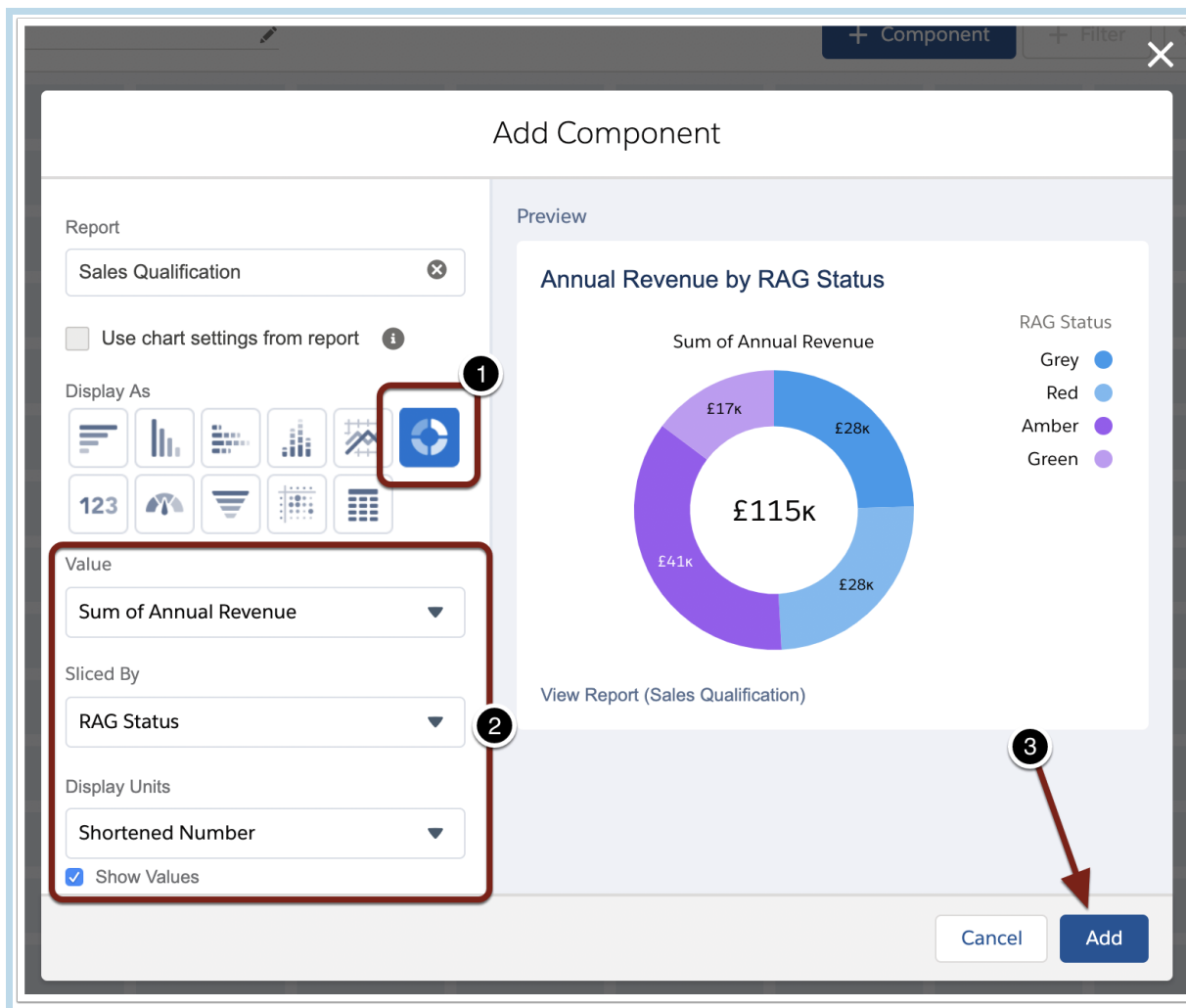
The **Select Report** window is displayed.



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

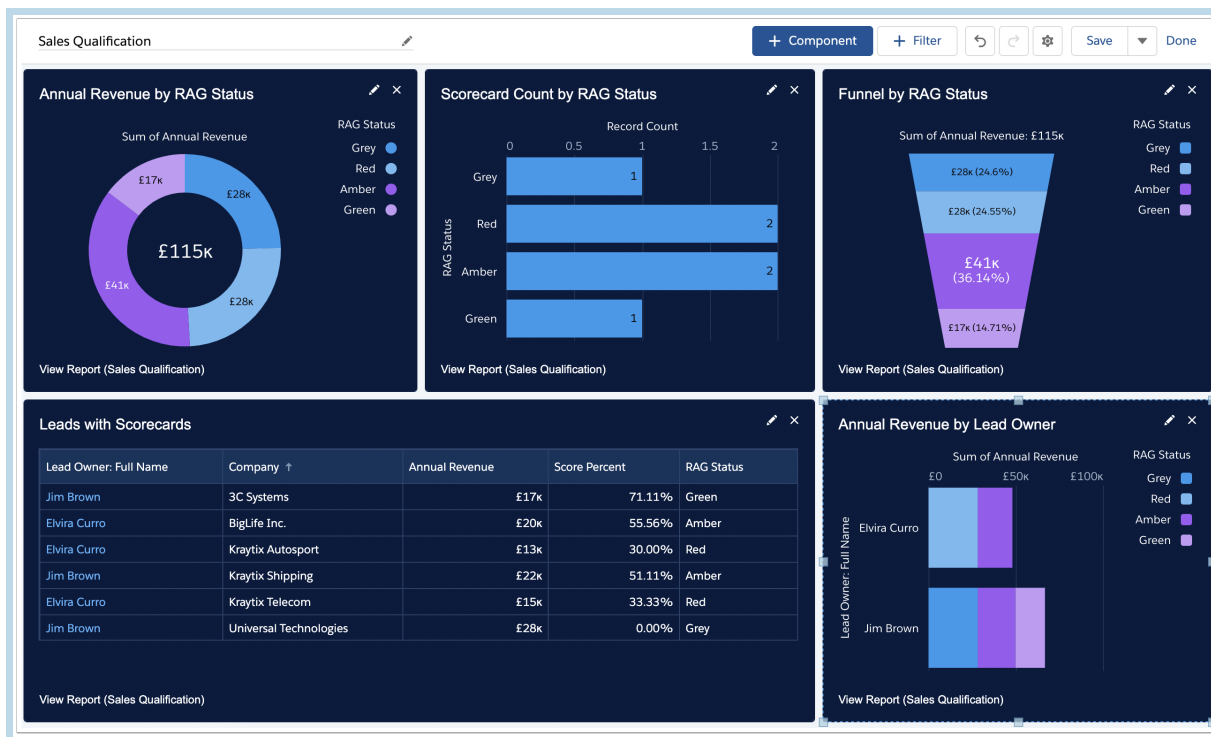
Component 4 of 5:

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

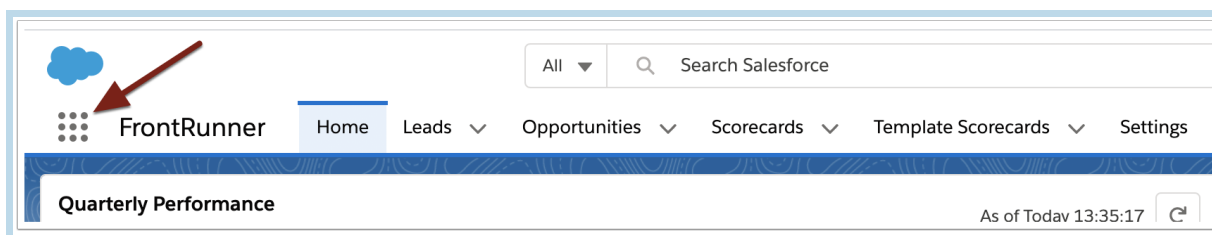
Layout your components to resemble the following:



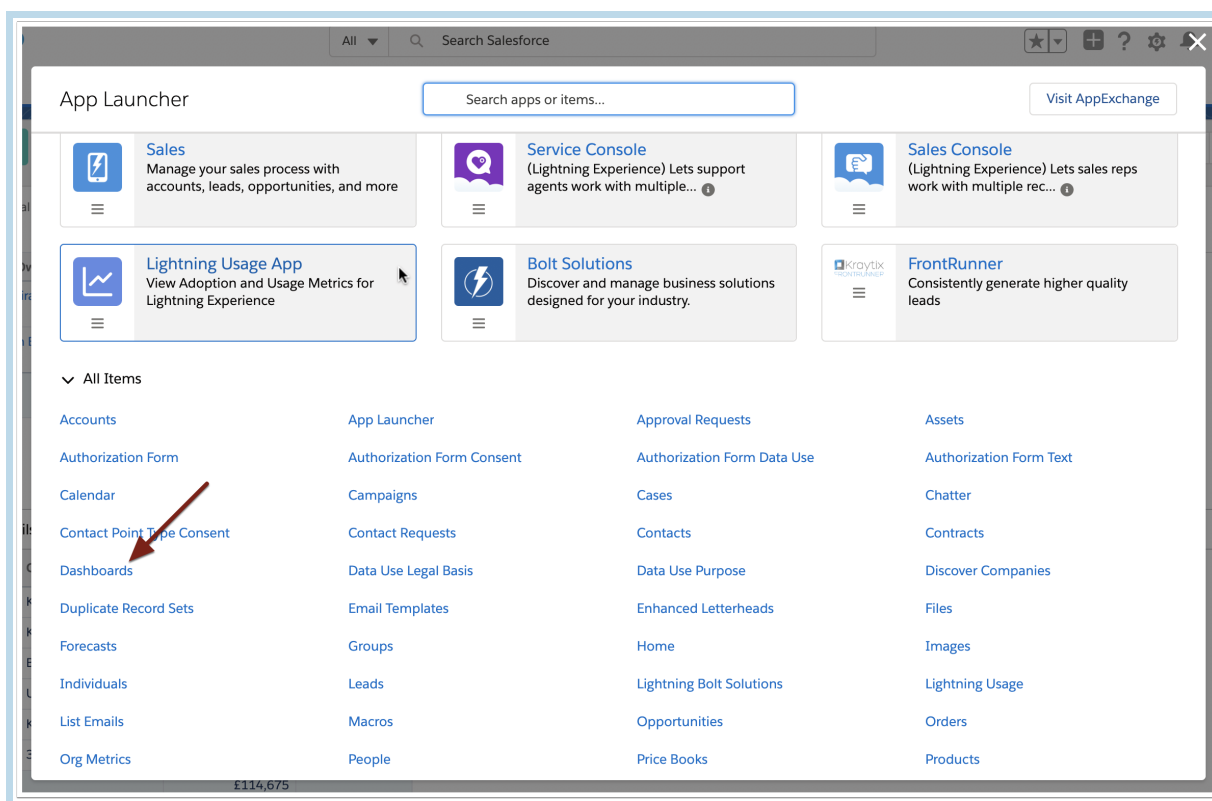
Click the **Save** button then the **Done** button to view your completed dashboard.

3.3 Step 4: Validation

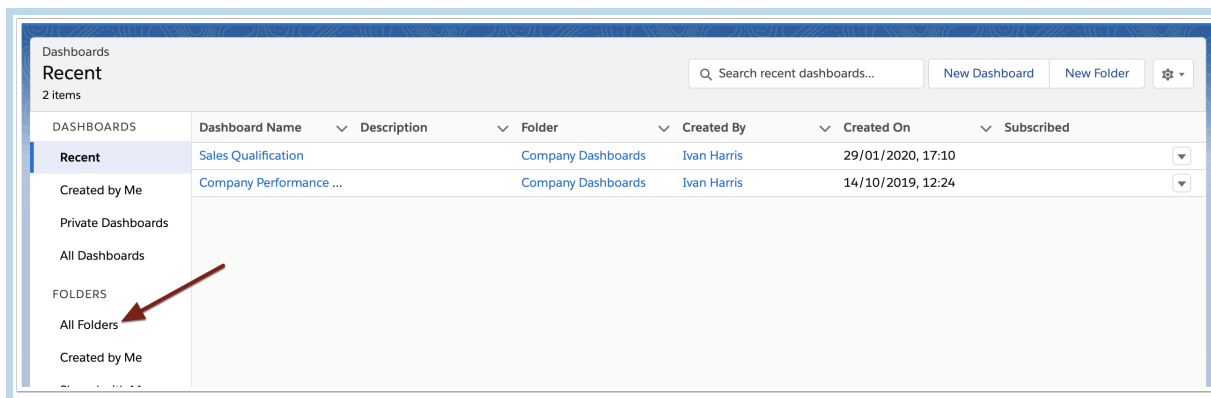
To view the dashboard, users open the App Launcher by clicking the  icon on the left side of the navigation bar.



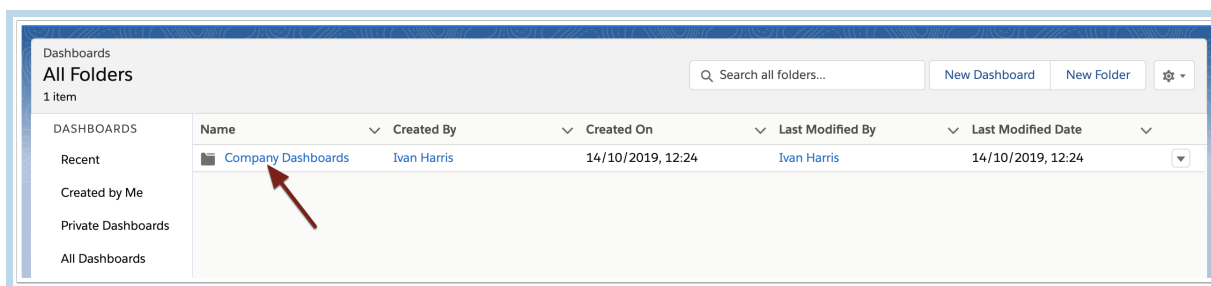
In the **App Launcher** scroll down and click the **Dashboards** link.



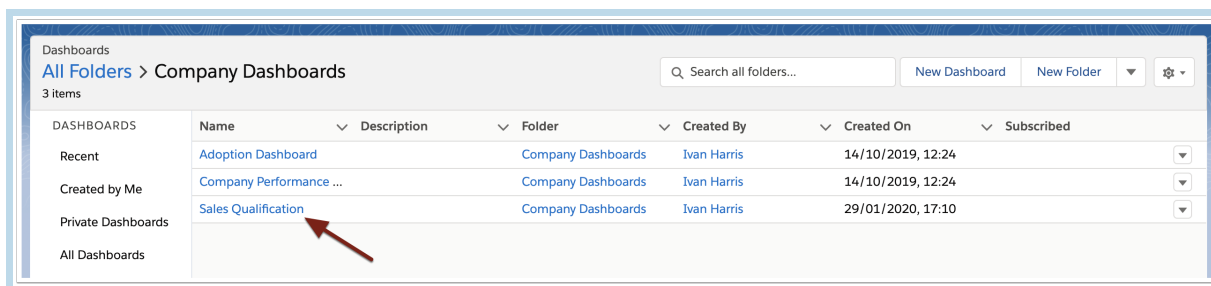
Click the **All Folders** link.



Click the **Company Dashboards** folder.



Click the **Sales Qualification** dashboard.



The dashboard will look like this:

