Building Dynamic Dashboards in Salesforce with Real-Time Data Updates

Empowering Business Decisions with Live Insights

What are Salesforce Dashboards?

- Visual representation of reports and data.
- Gives instant visibility into key business metrics.

Why Dynamic Dashboards?

- Personalized views
- Real-time insights for faster decision-making
- Scalability across teams and departments

Key Benefits of Real-Time Dashboards

- Instant data visibility across the organization
- Quick decision-making based on live data
- Automated refreshes—no manual effort
- Better collaboration between teams
- Improved forecasting and performance tracking

Core Components of a Salesforce Dashboard

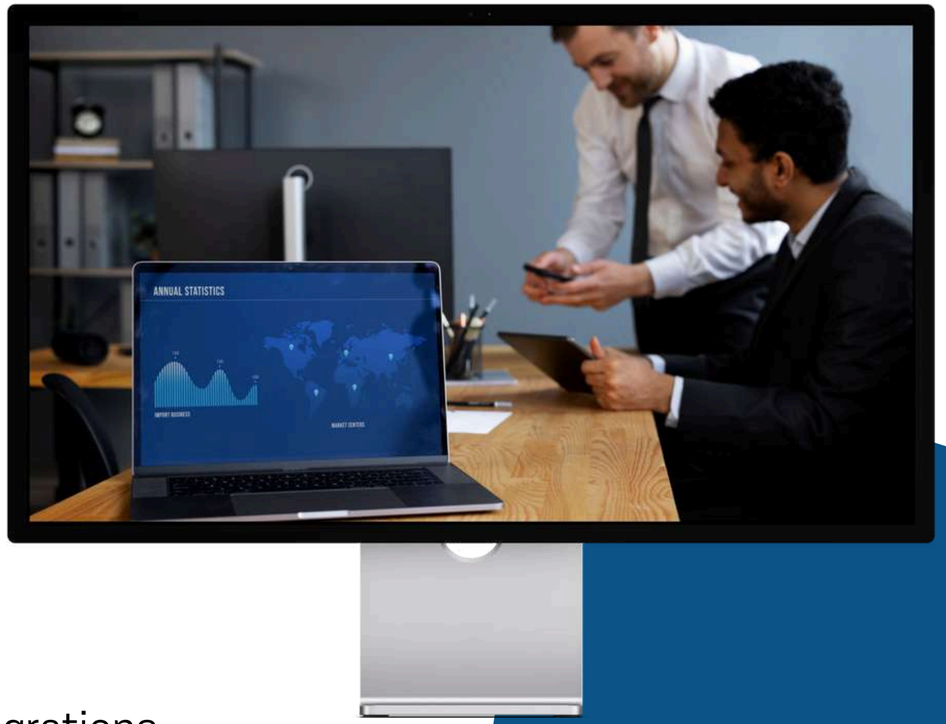
Reports: Foundation of any dashboard

Dashboard Builder: Drag & drop interface

Dashboard Filters: Personalized data view

Dynamic Dashboards: View as the logged-in user

Data Sources: Standard & custom objects, external integrations

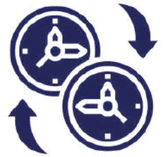


Real-Time Data Update Strategies

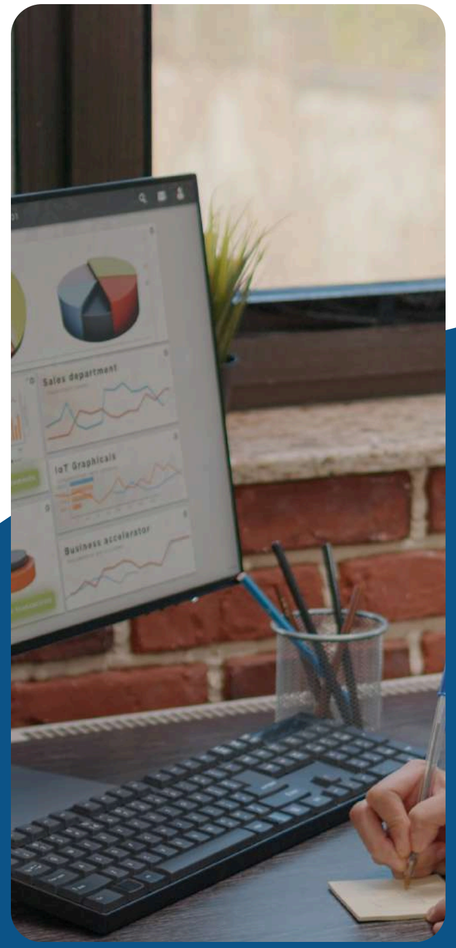
Use of Live Data Feeds & Streaming API

Auto-refresh capabilities

Integration with external data sources (via MuleSoft, API, etc.)

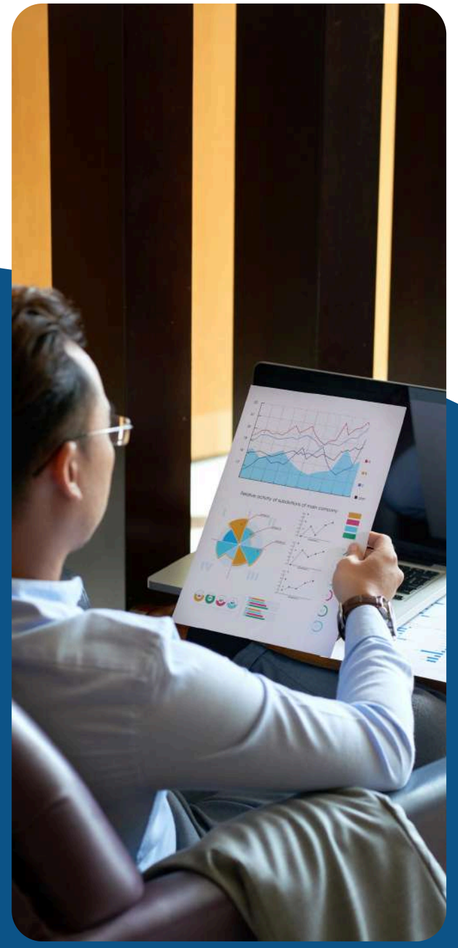


Scheduled refresh vs Real-time push



Building a Dynamic Dashboard Step-by-Step

- Identify Key Metrics & KPIs
- Build Source Reports (Tabular, Summary, Matrix)
- Open Dashboard Builder
- Add Components (Charts, Tables, Gauges, Metrics)
- Enable Dynamic Viewing (“View Dashboard As” setting)
- Set Real-Time Data Refresh Options



Best Practices

- Keep dashboards simple and focused on business goals
- Use filters for flexibility
- Minimize report components to optimize performance
- Use naming conventions and folder structure
- Schedule regular reviews to ensure relevance

Use Cases

Sales:
Real-time pipeline visibility

Service:
Tracking case resolution SLAs

Marketing:
Live campaign performance metrics

Finance:
Revenue and forecasting dashboards

Advanced Features

1. Einstein Analytics (Tableau CRM)
2. Lightning Dashboard enhancements
3. Interactive filters and drill-down
4. External data integration
5. Real-time alerts and notifications

Challenges & Considerations

Data refresh limits

User permissions & security

Performance impact with large data sets

Integration complexities

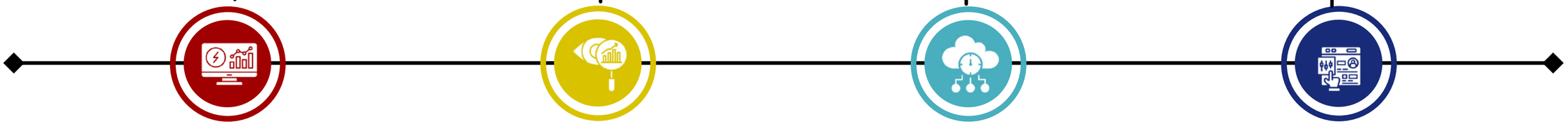
Future Trends

AI-powered dashboards

Predictive insights

More embedded real-time data streams

Increased interactivity and personalization



Summary

- Dynamic dashboards provide real-time visibility
- Empower faster, data-driven decision making
- Easy to build, powerful to scale
- Key to driving operational excellence

thank you

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Thank You