Admin Workshop
Lesson 3

Collaborating with Chatter
Analyzing Data with Reports and Dashboards

Objective

- Email Templates
- Collaborating with Chatter
  - How does is work?
  - Chatter Etiquette & Best Practices
  - Security & Visibility
  - Chatter Notifications
  - Chatter Publisher Actions & Publisher Layouts
  - Object-Specific Actions
- Analysing Data with Reports and Dashboards
  - Reports/Dashboard Overview (including Access through folders)
  - Table Reports, Summary Report, Matrix Reports, Custom Report Types
  - Bucketing, filters, joined
  - Dashboards, Dashboard Components,
  - Refreshing Dashboards, Mobile Dashboards

But First…

Review Lesson 2

What Can You Remember?

What are Permission Sets?
- Additional Profile Permissions assigned to specific users

What is Field Level Security?
- Determines access to edit or read individual fields by profile
- Restricts Access to fields within a profile
- Overrides less-restrictive page layout settings
- Can make a field read-only or totally hidden

What are Record Types?
- Determines the required fields by page layout and the valid pick list values by business process to ensure users only complete valid fields and values
- Define different sets of values for Standard and Custom picklist fields

Implement custom business process by associating them to specific page layouts

Record Ownership
- Users or Queues can be the owner of records
- If the read permission for the object is revoked from the users profile, the user will not be able to see their own record
- Queue ownership allows multiple users to own a record
- Sharing controls record access

What Can You Remember?

What are the Organizational Wide Defaults?

- Determine the base-line visibility of each record in an object

What is a role?

- Controls the level of visibility that users have to an organization's data

A user may be associated to one role

What is a role hierarchy?

- Controls data visibility
- Controls record roll up, forecasting and reporting
- Users inherit the record ownership ability of data owned by or shared with users below them in the hierarchy
- Not necessarily the company's organization chart

Email Templates

Folders

Folders provide organization and security for reports, dashboards, documents, and email templates.

- Folders can be created from:
  - The Reports tab.
  - The Dashboards tab.
  - The Documents tab.

Setup | Communication Templates | Email Templates

- You can delegate folder administration by assigning the appropriate "Manage" permissions to create folders.

User Permissions Needed	
To create, edit, or delete public document folders:	"Manage Public Documents"
To create, edit, and delete public email template folders:	"Manage Public Templates"
To create, edit, and delete public report folders:	"Manage Public Reports"
To create, edit, and delete public dashboard folders:	"Manage Dashboards" AND "View All Data"

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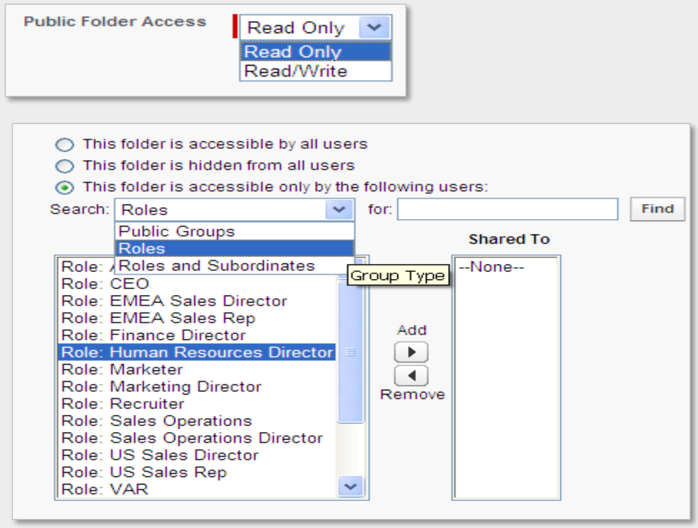
Teaching Points:
It's important to note that individual users may create email templates for their own use, under Personal Setup | Email | Email Templates. However, they cannot create folders from here, unless they have the appropriate profile permissions.
The standard user profile does not have permission to create folders – this is important to keep in mind when cloning the standard user profile to create new profiles. If the new profile needs to be able to create folders, these permissions will need to be checked in the profile permissions.

Extra Material:
(Links, keywords, help)

Suggestions:

Setting Folder Security

- The content within folders can be made Read Only or Read/Write.
- Folders can be hidden from users, or shared using public groups or your role hierarchy.



Email Templates

Email templates ensure that company branding is consistent and saves users time. Several sample email templates are included in the app.

- Email templates need to be set up for:
  - Web-to-lead
  - Web-to-case
  - Email-to-case
  - Assignment rules
  - Escalation rules
  - Auto-response rules
  - Workflow

Your name **| Setup | Communication Templates | Email Templates**

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Teaching Points:
(What concepts are covered on this slide)

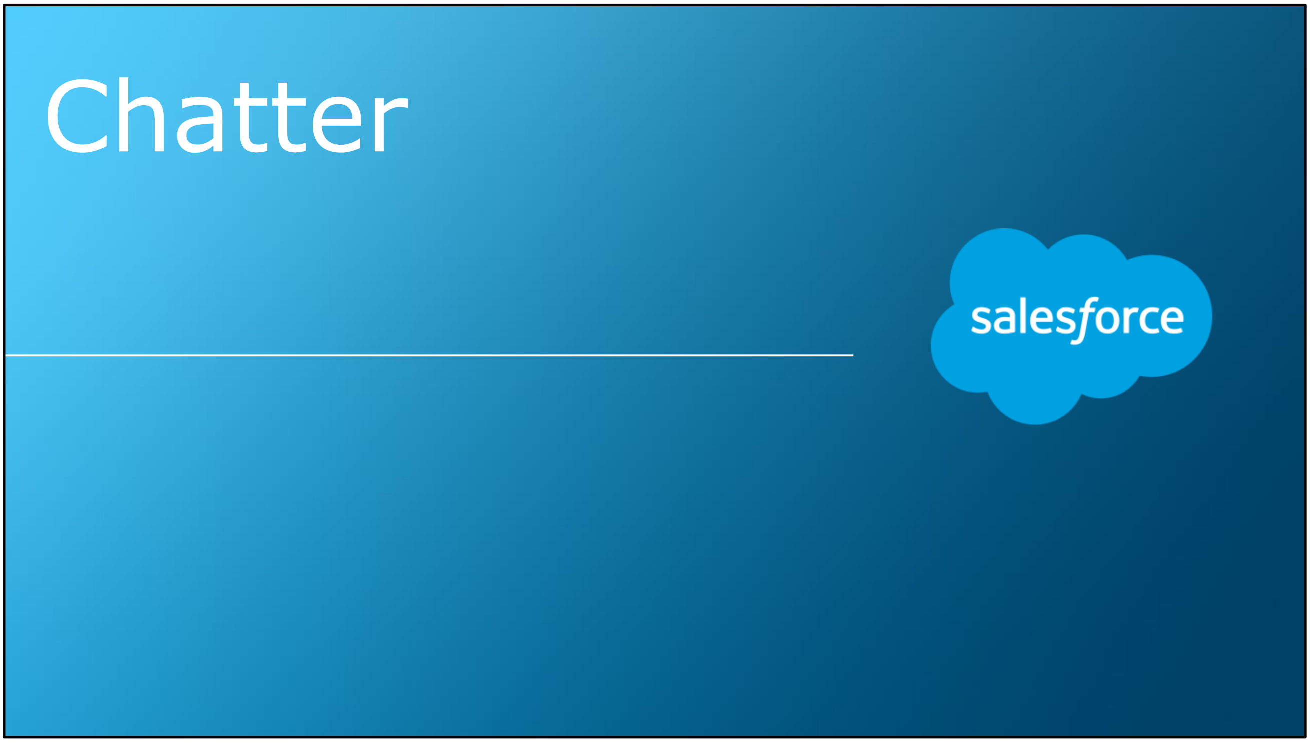
Extra Material:
(Links, keywords, help)

Suggestions:

Video: Mass Email for End Users

This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and keep track of these emails within the Salesforce app. (5 min)

https://www.youtube.com/watch?v=cjtRkC_pTec


Chatter
salesforce

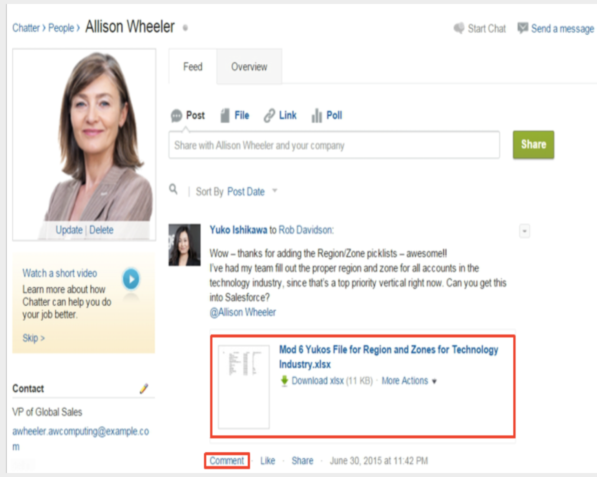
Video: Salesforce Chatter Intro

This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and keep track of these emails within the Salesforce app. (5 min)

https://www.youtube.com/watch?v=tfnQRKMOqi0

What is Chatter

- Collaboration application built into the Salesforce user interface
- Helps you to connect with other users inside your organization and share business information securely and in real time
- Chatter Tab gives you instant access to most features
- Your Profile acts as your identity within your organization
- You can manage all your groups activities from your Groups Tab
- Chatter makes it easy to connect with the people and information you care about most.



Chatter Benefits

Bringing the functionality of your social network to your workload

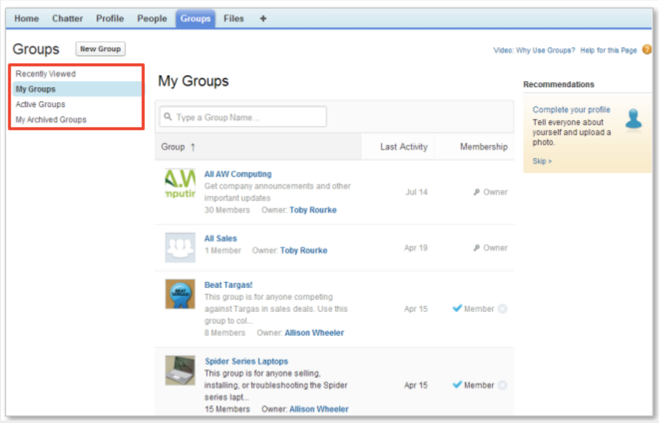
Manage records and get access to subject matter experts through one interface

Chatter

- Once you enable Chatter for your organization, you can turn on feeds for most standard objects and all custom objects, allowing you to see real-time updates whenever anything changes.
- Users can post to feeds, comment on other posts, share files and links, work together on documents, follow people and records.
- With feed tracking, users can even follow specific fields on a record. When a value for one of those fields changes, Chatter posts an update to the feed, instantly alerting everyone who follows that record.
- With mentions (@), users can mention someone to make sure that person sees their update.
- With hashtags (#), users can add topics to posts and comments so other people can find their updates more easily.
- Chatter users have their own personal profile feeds, where they can post updates and see updates from the people and records they're following.
- Users can also form public or private groups for more focused collaboration. Each group has its own feed, where the group members can share information, ask questions, and upload files for collaboration. Chatter makes it easy to connect with the people and information you care about most.

Chatter Groups

- Every user can create Chatter Groups
- Groups provide a private or public space for sharing knowledge, insight, files and links.
- The Groups tab lists all groups, both public and private.
- Administrators and group owners can delete groups.



Hands-on Exercise

Prepare your training org

View the hands on exercise steps in the "Admin ...." Exercise Guide

https://lms.cfs-api.com/v1/content/1ddba721-6e5a-49ab-816c-610776ccbd8a/presentation_content/external_files/introductiontoforce.comexerciseguide.pdf

Make sure that all system messages from the org come to you
Make sure you can access the org outside of your corporate network.

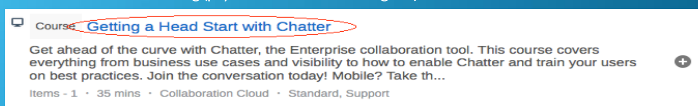
Task: Create a custom Position object.

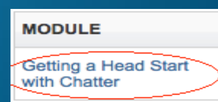
Video: Getting a Head Start with Chatter

Get ahead of the curve with Chatter, the Enterprise collaboration tool. This course covers everything from business use cases and visibility to how to enable Chatter and train your users on best practices. (33 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Getting a Head Start with Chatter"
- Make sure to select this training (pay attention to the video logo):





- Select the module "Getting a Head Start with Chatter":
- Enjoy the 33 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000gjKvEAI

Hands-on Exercise

View the hands on exercise steps in the **Administration Essentials for New Admins** Exercise Guide "Getting Your Organization Ready for Users"

https://lms.cfs-api.com/v1/content/528efcf0-2ff1-48c6-b5e5-232015463e37/presentation_content/external_files/gettingyourorganizationreadyforusers.pdf

Exercise 2-9: Create Public and Private Chatter Groups

Additional Chatter exercises:

- Update your Chatter profile
- Create a Chatter group and invite members
- Edit sharing settings for this group
- Post a message and file
- Change notification settings
- Log into your mobile device and explore Chatter

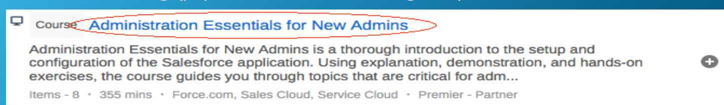
- 2-10:

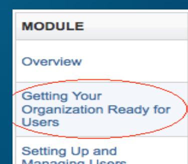
Video - Getting Your Organization Ready for Users - Chatter

Learn how to enable and customize a variety of user interface settings for your end users, including list views, tabs, and search. Learn the basics of organization administration, including how to set up your company profile, add multiple currencies, and change the calendar used in Salesforce. (52 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Administration Essentials for New Admins"
- Make sure to select this training (pay attention to the video logo):





- Select the module "Getting Your Organization Ready for Users":
- Enjoy the 52 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000glS6EAI

Remember about Chatter

When you enable Chatter:

- The Chatter app is added to the Force.com app menu.
- The Chatter tab is added to all standard apps.
- The following objects are Chatter enabled:
  - Account, Case, Chatter Group, Contact, lead, Opportunity, User.
- Several fields on each of these objects are enabled.
- A user can have up to 100 Chatter Groups and the org up to 10,000

Resources

Chatter Resource Page

- http://www.salesforce.com/chatterguide/

For Chatter news go here

- https://www.salesforce.com/chatter/overview/

Chatter Developer Community

  - http://developer.force.com/chatter

Chatter Publisher Actions Implementation Guide:

- http://help.salesforce.com/help/pdfs/en/actions_impl_guide.pdf

Chatter Best Practices

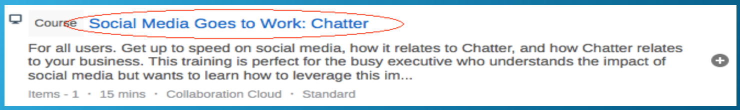
- https://lms.cfs-api.com/v1/content/b7f38d2d-7810-4a44-bce4-240ab92be039/presentation_content/external_files/ChatterBestPractices.pdf

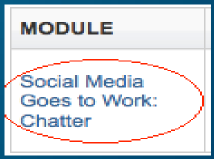
Video – Social Media Goes to Work: Chatter

For all users. Get up to speed on social media, how it relates to Chatter, and how Chatter relates to your business. This training is perfect for the busy executive who understands the impact of social media but wants to learn how to leverage this impact in the workplace without losing productivity. In this training you'll see several examples of how to use Chatter to meet specific business needs, and you'll learn a few interesting facts about social media along the way. Mobile? Take this course on an iPad. (15 min)

How to Get to this training video ?

- You need an **@partnertraining.com account**.
- To avoid a mixup with saved credentials open a private window in a new browsr.
- Browse to http://help.salesforce.com and log in with your @partnertraining.com account.
- Search for "Social Media Goed to Work"
- Make sure to select this training (pay attention to the video logo):





- Select the module "Social Media Goed to Work: Chatter":
- Enjoy the 15 min video.
- Direct Link: (only works after you've logged in with your @partnertraining.com account, paste in browser) https://help.salesforce.com/HTTrainingModulesDetail?courseId=a1S30000000grYNEAY

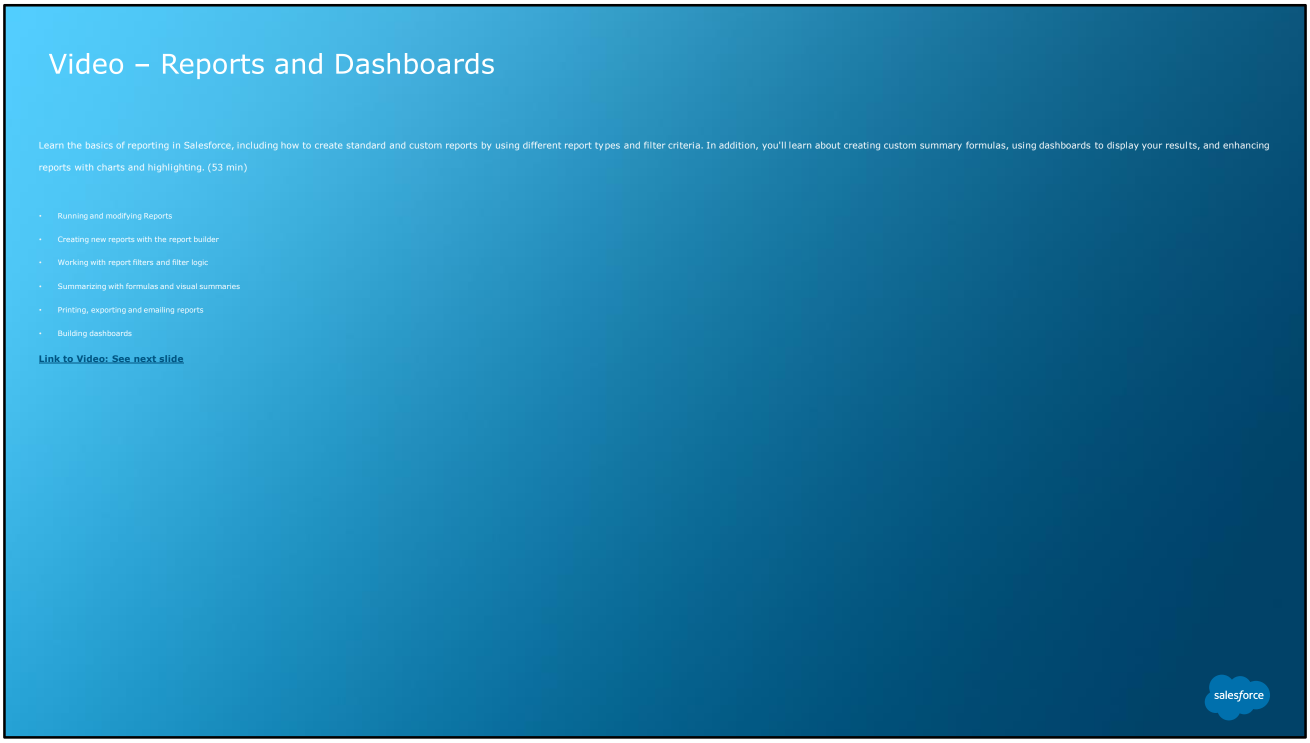
Analyzing Data with Reports and Dashboards

Please create a new Training Org Now!

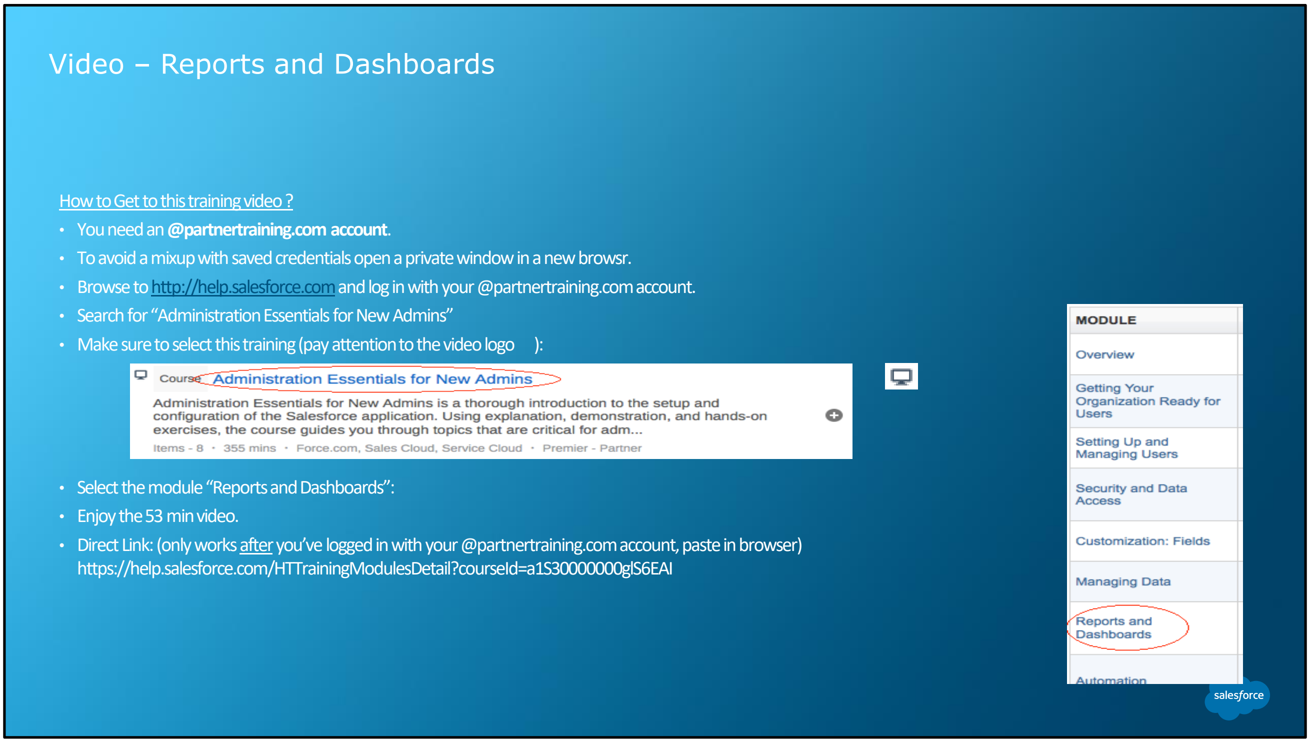
Here is the link to create the 2nd training org:
https://www.salesforce.com/form/signup/freetrial_training.jsp

In the Training course field, select the **"Administration Essentials for New Admins"** course to receive the correct training org.

Reports



- Play “Building dashboards” later



- Play "Building dashboards" later

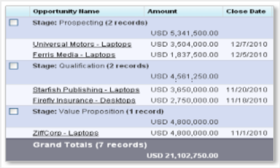
What are Reports?

- Reports are lists or summaries that allow you to aggregate and analyze your data in different ways

- Tabular Report is a simple listing of data

First Name	Last Name	Mailing Street	Mailing City
Jake	Thomsen	1200 Broadway	New York
Jill	Wanyford	370 N. Wabasha St.	St. Paul
Brian	Jolly	370 N. Wabasha St.	St. Paul
Rebecca	Worthington	12 Spear Street	San Francisco
Trip	Wolfe	189 Crate Ave	Fells Point
Ann	Wacker	1 Bartholomew Lane	London
Ellie	Mae	12 Rue de la Couture	Rungis Cedex
Richard	Kee	30-2, Shimomaruko 3-Chome	Ohta-ku
Leanne	Tomlin	1350 Charleston Rd.	New York
Jay	Yancey	334 Market Street	SF

- Summary Report is based certain on columns can be crated using the summary format



Opportunity Name	Amount	Close Date
Stage: Prospecting (2 records)		
	USD 5,341,500.00	
Universal Motors - Laptops	USD 3,504,000.00	12/7/2010
Ferris Media - Laptops	USD 1,837,500.00	12/5/2010
Stage: Qualification (2 records)		
	USD 4,561,250.00	
Starfish Publishing - Laptops	USD 3,850,000.00	11/20/2010
Firefly Insurance - Desktops	USD 2,750,000.00	11/18/2010
Stage: Value Proposition (1 record)		
	USD 4,800,000.00	
ZiffCorp - Laptops	USD 4,800,000.00	11/1/2010
Grand Totals (7 records)		
	USD 21,102,750.00	

- Matrix Reports displays formats like pivot tables , as groupings and summaries

Preview Matrix Format Show Add Chart Remove All Columns

		Opportunity Name	Acme Inc - 6 Star 10 Series Desktops		American Packa
		Stage	Closed Won	Subtotal	Closed Won
Age	Last Modified By	Drop summarizable fields into the matrix.			
	Rob Davidson	Sum of Amount Sum of Fiscal Year Record Count	USD 140,000.00 2011 1	USD 140,000.00 2011 1	USD 10,000.00 2011 1
		Amount Fiscal Year Record Count	USD 140,000.00 2011 1		
		Amount Fiscal Year Record Count			USD 10,000.00 2011 1

Standard and Custom Reports

Use the standard built-in reports or create your own custom reports.

Standard reports:

- Are built in.
- Are stored in standard folders.
- Can be customized and saved as custom reports.
- Cannot be overwritten or deleted.

Custom reports:

- Can be built from scratch.
- Can be created by customizing standard reports.
- Must be saved in a custom, personal, or unfiled folder.
- Can be overwritten or deleted.

- **Teaching Point**
- **Extra Materials**
- **Suggestions**

Hands-On Exercise

View the hands on exercise steps in the Administration Essentials for New Admins "Reports and Dashboards" Exercise Guide
https://lms.cfs-api.com/v1/content/2ece95fc-a54e-4cea-901c-c2304537d83a/presentation_content/external_files/ReportsandDashboardsExerciseGuide.pdf

Exercise 7-1: Run and Modify a Report
Exercise 7-2: Create a Simple Custom Report
Exercise 7-3: Create a Matrix Report
Exercise 7-4: Use Filters and Filter Logic in a Report
Exercise 7-5: Create a Custom Report
Exercise 7-6: Filter a Report with Relative Date Values
Exercise 7-7: Add a Custom Summary Formula
Exercise 7-8: Add Highlights and a Chart
Exercise 7-9: Schedule and Email a Report
Exercise 7-10: Create Custom Adoption Reports
Exercise 7-11: Build a Global Sales Dashboard
Exercise 7-12: Create a User Adoption Dashboard

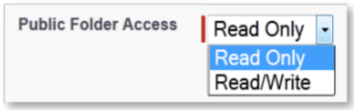
- Link is also in Video

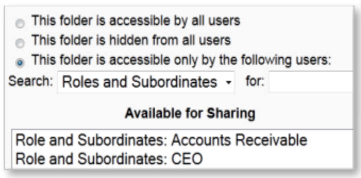
Report and Dashboard Folder Sharing

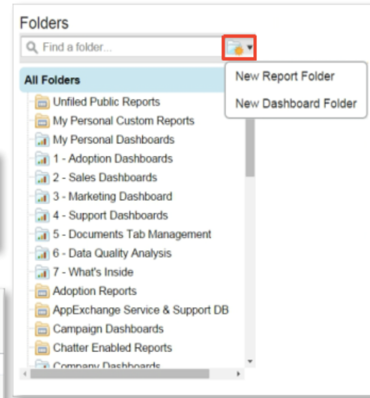
Traditional Model

Access to reports and dashboards is controlled through folders on the Reports tab. Traditionally, all users with access to the folder have the same level of access.

- Access can be Read Only or Read/Write
- Folders can be accessible to all users, hidden from all users, or shared using public groups or roles



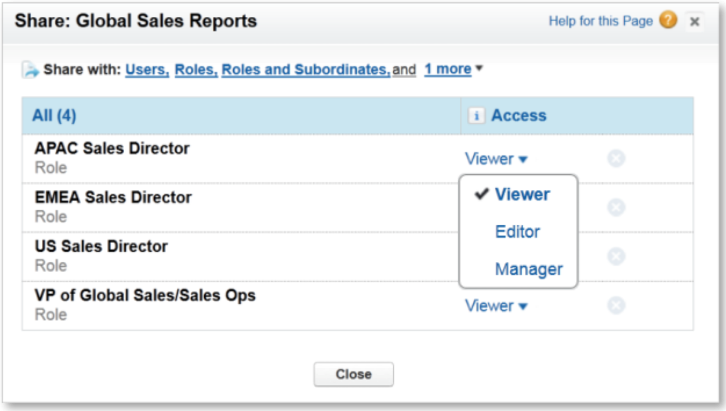




Report and Dashboard Folder Sharing

Enhanced Model

Enhanced folder sharing gives users finer control over how they share their reports and dashboards. Different groups of users can be given different access to the same folder.



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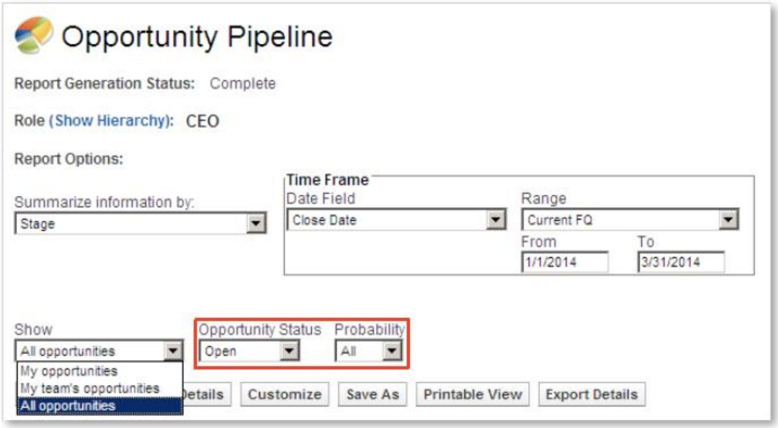
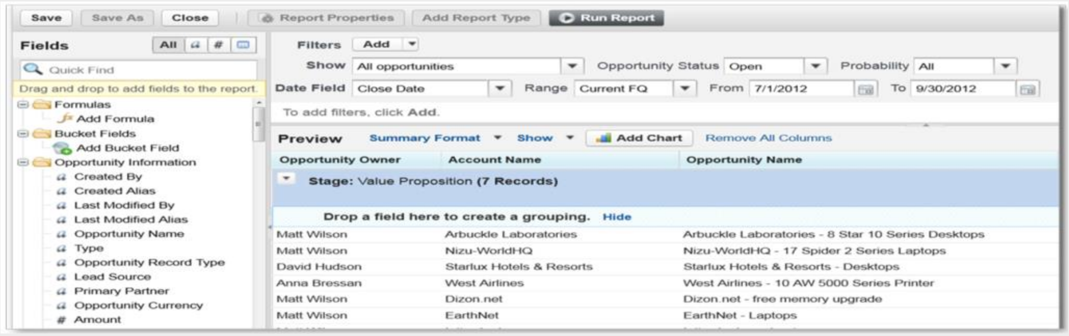
Using Report Options for Quick Customization

- Always available at the top of every report
- Options depend on the type of data being reported on
- Make changes in a few clicks, then save as a new report



The Report Builder

The report builder is a drag-and-drop tool that allows you to customize existing reports or create new ones from scratch.



- Drag and drop fields into preview pane and add charts
- Add filters, groupings and summarize fields
- Preview up to 50 live records

Tabular Report

- A simple list of records
- Used for mailing lists and activity reports

Account Name ↑	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code
Acme-NY	1350 Charleston Rd.	New York	NY	31345
Cable Inc.	1515 Broadway	New York	NY	10035
Firefly Insurance	55 East 5th Street	NY	NY	10003
Installese Inc.	22 5th Ave	New York	NY	10998
Jam Television	5150 Broadway	New York	NY	10022
Service Style	5566 Main Street	New York	NY	10993
Starlux Hotels & Resorts	1111 Westrun Blvd	White Plains	NY	10604
TMI Inc	1234 Westcentral Ave	White Plains	NY	10604
ZiffCorp	75 Rockefeller Plaza	New York	NY	10019
Grand Totals (9 records)				

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Report Formats Part 1: Tabular Report

A tabular report provides a simple listing of your data without subtotals.
Example: Mailing list report

Account Name	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code
Acme	10 Main Rd.	New York	NY	31349
Santek-Italy	Via Crocefisso, 19	Milano	-	20122
Jam Television-Singapore	10A Orchard Road	-	-	238890
Starlux Hotels & Resorts	1111 Westrun Blvd	White Plains	NY	10604

Tip: Enable floating report headers to have your column headings float at the top of the screen as you scroll down long tabular reports.

Report and Dashboard User Interface Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

☑ Enable Floating Report Headers

Account Name	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code
Tarson Stores, Inc.	2446 Tarson Way	Oakland	CA	95134

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- All new reports that you create in the report builder will initially be in tabular format.
- **Note:** Floating report headers are only available for tabular reports.

Hands-On Exercise

View the hands on exercise steps in the Administration Essentials for New Admins "Reports and Dashboards" Exercise Guide
https://lms.cfs-api.com/v1/content/2ece95fc-a54e-4cea-901c-c2304537d83a/presentation_content/external_files/ReportsandDashboardsExerciseGuide.pdf

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Exercise 7-10: Create Custom Adoption Reports

Exercise 7-11: Build a Global Sales Dashboard

Exercise 7-12: Create a User Adoption Dashboard

- Link is also in Video

Summary Report

- Records sorted into groups with subtotals

Grouped By: Opportunity Owner

Sorted By: Sum of Amount

- Opportunity Owner
- ✔ Sum of Amount
- Record Count

Opportunity	Amount	Close Date	Stage
Opportunity Owner: Jin Chang (5 records)			
	USD 6,900,000.00		
Ferris Media - Laptops	USD 1,250,000.00	12/13/2013	Needs Analysis
Global Print Media - 9 Spider 2 Series Laptops	USD 3,650,000.00	12/17/2013	Needs Analysis
Intron - free memory upgrade	USD 50,000.00	11/26/2013	Proposal/Price Quote
Canson - 15 Spider Series 3 Laptops	USD 150,000.00	12/18/2013	Needs Analysis
Arbuckle Laboratories - Laptops	USD 1,800,000.00	12/16/2013	Qualification
Opportunity Owner: Anjana Shah (3 records)			
	USD 4,565,250.00		
HomeNet Technologies - Laptops	USD 821,250.00	12/21/2013	Qualification
TMI - 40 free memory upgrade	USD 3,504,000.00	12/19/2013	Prospecting
Ecotech Germany - 10 Spider 3 Series Laptops	USD 240,000.00	11/25/2013	Proposal/Price Quote
Grand Totals (8 records)			
	USD 11,465,250.00		

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Report Formats Part 2: Summary Report

A summary report provides a listing of data, like a tabular report, plus sorting and subtotaling of data.

Example:
Report showing all opportunities, grouped by stage, with an amount subtotal

	Opportunity Owner	Opportunity Name	Amount	Close Date
☐	**Stage:** Id. Decision Makers **(2 records)**		USD 66,575.00	
	Matt Wilson	Ecotech desktops	USD 31,575.00	2/9/2010
	Matt Wilson	Ecotech desktop + laptops	USD 35,000.00	2/9/2010
☐	**Stage:** Perception Analysis **(2 records)**		USD 73,000.00	
	Matt Wilson	Smithee Telephony Integration	USD 28,000.00	2/28/2010
	Matt Wilson	Smithee Knowledge Implementation	USD 45,000.00	2/28/2010
☐	**Stage:** Proposal/Price Quote **(1 record)**		USD 50,000.00	
	Admin User	ABC- 10 Laptops	USD 50,000.00	1/25/2010
☐	**Stage:** Negotiation/Review **(2 records)**		USD 1,032,000.00	
	Phil Smith	ABC-123	USD 1,000,000.00	1/31/2010
	Matt Wilson	Starlux Telephony Integration	USD 32,000.00	2/23/2010
	Grand Totals (7 records)		**USD 1,221,575.00**	

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Floating Report Headers

CLICK PATH: Setup | Customize | Reports & Dashboards | Reports and Dashboards Settings

Matrix Report

- Summarizes data in a grid against horizontal and vertical criteria
- Provides totals for both rows and columns

Sum of Amount	Stage			Grand Total
Opportunity Owner	Perception Analysis	Proposal/Price Quote	Negotiation/Review	
Admin User	USD 0.00	USD 50,000.00	USD 40,000.00	USD 90,000.00
ABC- 10 Laptops		USD 50,000.00		
TMI - 40 Printers			USD 40,000.00	
David Hudson	USD 0.00	USD 750,000.00	USD 0.00	USD 750,000.00
Starlux Hotels & Resorts - Desktops		USD 750,000.00		
Matt Wilson	USD 73,000.00	USD 0.00	USD 32,000.00	USD 105,000.00
Smithee Telephony Integration	USD 28,000.00			
Smithee Knowledge Implementation	USD 45,000.00			
Starlux Telephony Integration			USD 32,000.00	
Phil Smith	USD 0.00	USD 1,095,000.00	USD 1,000,000.00	USD 2,095,000.00
Starfish Publishing- Desktops		USD 1,095,000.00		
ABC-123			USD 1,000,000.00	
Grand Total	USD 73,000.00	USD 1,895,000.00	USD 1,072,000.00	USD 3,040,000.00

Hands-On Exercise

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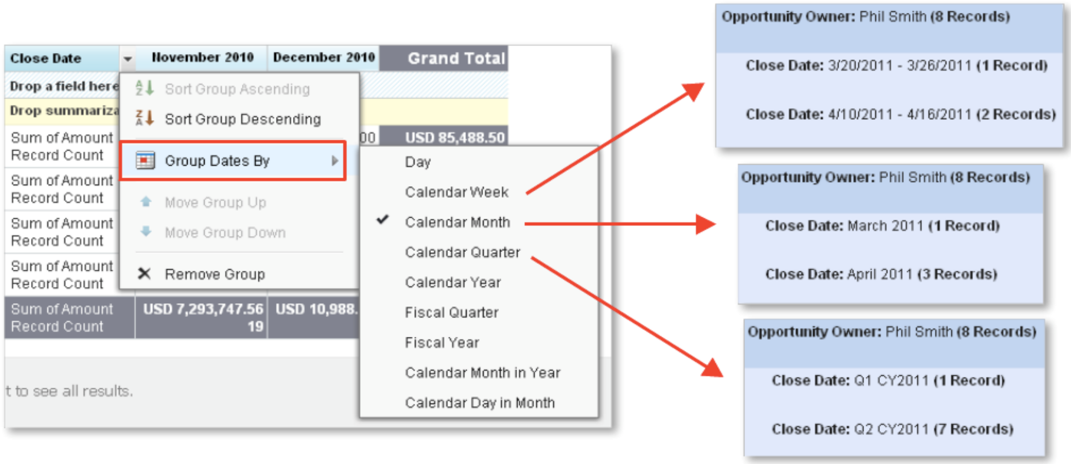
- Link is also in Video

Grouping by Date Fields

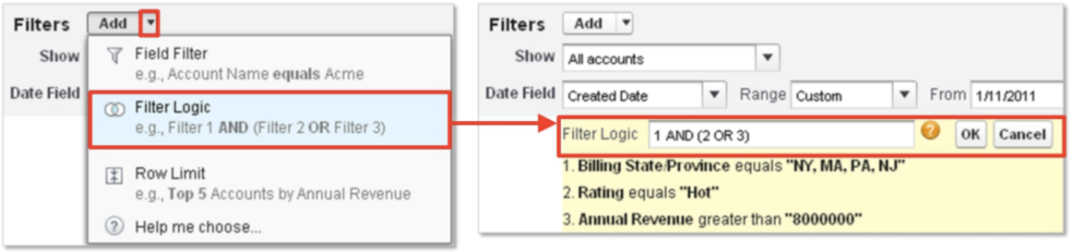
While grouping a report by a date field, select **Group Dates By** from the group menu to specify the grouping time frame.



Report Filters and Filter Logic

Add up to 20 additional filters to a report, directly in the Filters pane, using the **Add** button or by dragging in fields from the Preview pane. In addition, use filter logic to:

- Link multiple filters using “AND,” “OR,” and “NOT” operators to create sophisticated conditions.
- Offset priority conditions using parentheses and nested parentheses.



Using Relative Date Values in Custom Report Filters

Rob can create dynamic date ranges for reports using relative date values in filters.

yesterday	**today**	**tomorrow**
last week	**this month**	**next quarter**

For extra flexibility, Rob can use variables in relative date values for days, quarters, and years.

last *n* days	**last *n* quarters**	**last *n* years**
next *n* days	**next *n* quarters**	**next *n* years**

"What opportunities are due to close in the next five days?"

Close Date | equals | next 5 days

"How many cases did we close in the last three quarters?"

Closed Date | equals | last 3 quarters

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Hands-On Exercise

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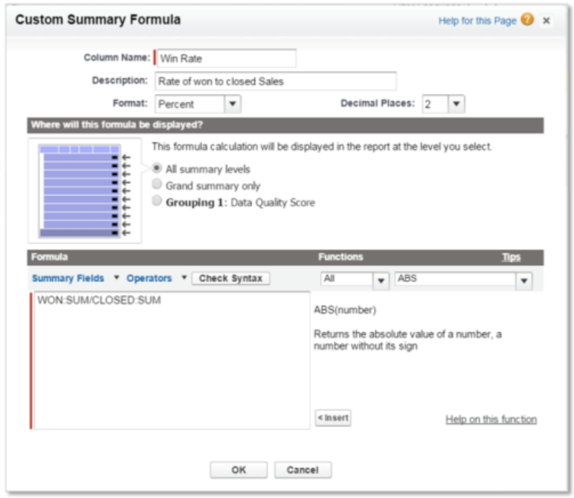
- Link is also in Video

Adding Custom Summary Formula to a Report

- Up to five per report
- Cannot reference other summary formulas
- Can reference formula fields in the data
- Only display on summary rows, not detail (record) rows



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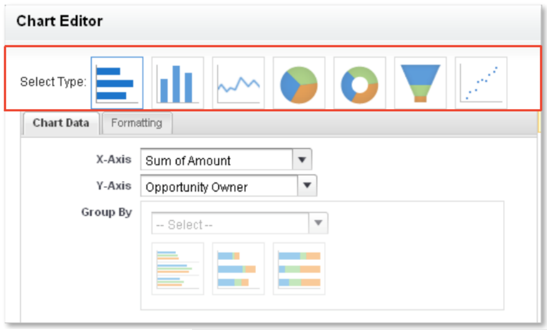
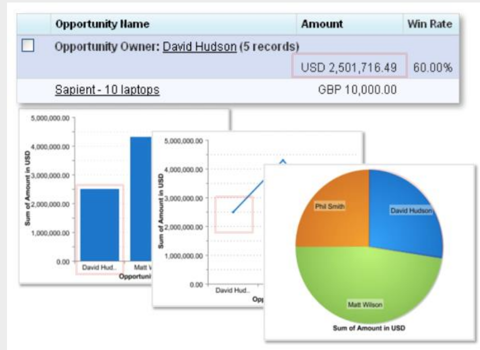
- Link is also in Video

- Highlight up to three summarized or summary formula values in different colors depending on where they fall in relation to a specified range
- You can use conditional highlighting for summary and matrix reports.
- You can choose up to three number ranges and colors to conditionally highlight summary data in your report.

Adding a Chart to a Report

Use charts to visually present the data in your summary rows.





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- Link is also in Video

Chart Types: Single Groupings

Bar Charts

Line Charts

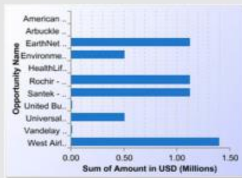
Pie/Donut Charts

Funnel Charts

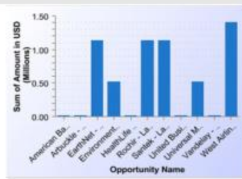
Scatter Charts

Bar Charts

- Each bar represents data from a grouping.
- Use horizontal to compare many groups.
- Use vertical to compare fewer groups or when grouping by a date field.



Horizontal Bar



Vertical Bar

Chart Types: Single Groupings

- Bar Charts
- Line Charts
- Pie/Donut Charts
- Funnel Charts
- Scatter Charts

Line Charts

- Each point represents data from a grouping.
- Use when grouping by a date field.
- Great for displaying changes over time.

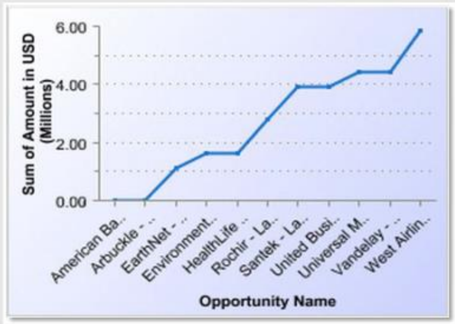


Chart Types: Single Groupings

- Bar Charts
- Line Charts
- Pie/Donut Charts
- Funnel Charts
- Scatter Charts

Pie/Donut Charts

- Each wedge represents data from a grouping.
- Size of wedge is determined by summary field.
- Use to compare shares of the grand total.
- Use a donut chart to display the grand total.

Pie Chart

Donut Chart

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Chart Types: Single Groupings

- Bar Charts
- Line Charts
- Pie/Donut Charts
- Funnel Charts
- Scatter Charts

Funnel Charts

- Each segment represents data from a grouping.
- The size of segments is determined by the summary field of each grouping.
- Use funnel charts to compare the summarized values of groupings.

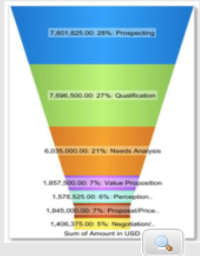


Chart Types: Single Groupings

Bar Charts

Line Charts

Pie/Donut Charts

Funnel Charts

Scatter Charts

Scatter Charts

- Plot two summary fields against each other.
- Visualize the correlation between values in a group.
- Enable the report builder upgrade to use scatter charts.

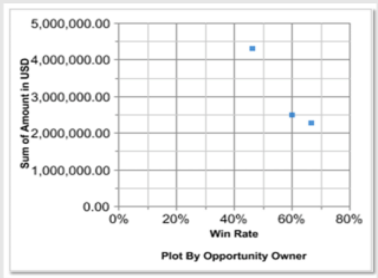


Chart Types: Multiple Groupings

Side-by-Side Bar

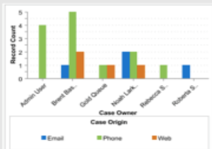
Stacked Bar

Stacked to 100% Bar

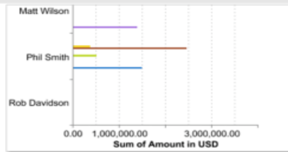
Grouped Line

Side-by-Side Bar

- Use this type of chart for multiple groupings.
- Each source is represented by a set of bars.



Vertical Bar



Horizontal Bar

Chart Types: Multiple Groupings

Side-by-Side Bar

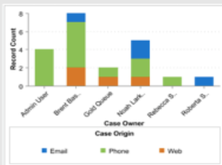
Stacked Bar

Stacked to 100% Bar

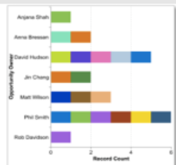
Grouped Line

Stacked Bar

- Use this bar graph to display the proportions between values.
- It displays a single bar for each primary value, with secondary values shown on the same bar.



Vertical Stacked Bar



Horizontal Stac[illegible]ar

salesforce

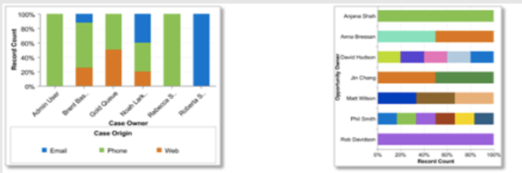
salesforce

Chart Types: Multiple Groupings

- Side-by-Side Bar
- Stacked Bar
- Stacked to 100% Bar
- Grouped Line

Stacked to 100% Bar

- Use this for proportions between values in each grouping.
- All bars are the same overall length.



Vertically Stacked to 100%   Horizontally Stacked to 100%

Chart Types: Multiple Groupings

Side-by-Side Bar

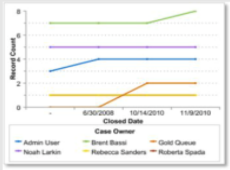
Stacked Bar

Stacked to 100% Bar

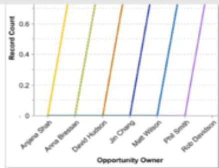
Grouped Line

Grouped Line

- Each bar represents an ordered set of data.
- Missing values are displayed as gaps.

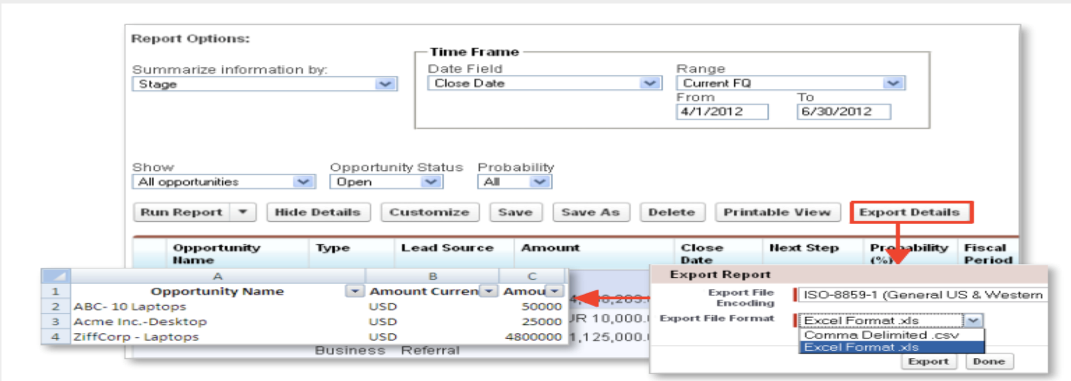


Grouped: Line



Line: Grouped Cumu

Printing and Exporting Report Results



- The Printable View and Export Details buttons are not available in the report builder
- You must run the report before you can print or export it.
- Export creates a .csv or .xls file, user can save the file or open it in Excel
- No formatting, groupings, or subtotals are exported

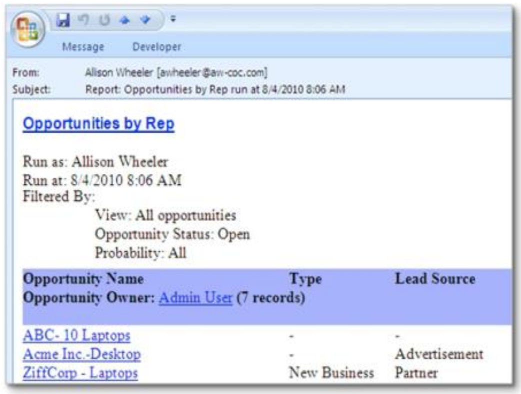
Scheduling and Emailing Reports

To schedule and email reports, he needs to specify:

- A running user.
- Frequency.
- Start and end dates.

The resulting email contains:

- Report information.
- Data in HTML with links to Salesforce.
- A link to the report.



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- Link is also in Video

Remember about Reports

Who can run reports?

- Users with the “Run Reports” permission can run reports.
- Users must have access to report folder.
- Folders can be public, private, or accessible to select users.
- Administrators can set folder access or create new folders.

Account Name	Opportunity Name	Amount
Dixon Chemical - Spain	Dixon Chemical - 24 Laptops	USD 20,000.00
Jam Television-Singapore	Jam Television - Laptops	USD 240,000.00
Starfish Publishing	Starfish Publishing- Desktops	USD 1,095,000.00
Dixon Chemical Corporation	Dixon Chemical Corporation - Laptops	USD 171,550.00
Canson	Canson - Laser free memory upgrade	USD 4,000.00
Dixon Chemical - Spain	Dixon Chemical - 2000 Desktops	USD 36,000.00

What data can user see in a report?

- Data from standard and custom objects.
- Date from records and fields that are visible to them.

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- **Teaching Point**
- **Extra Materials**
- **Suggestions**

Impact of Relationships on Reports

Relationship Type	Standard Report Types	Report Type Category
Lookup	Object by itself Object with first lookup Object with second lookup Object with third lookup	Based on the object
Master-Detail	Master object by itself Master object with detail object Master object with detail object and first lookup Master object with detail object and second lookup Master object with detail object and third lookup	Master object
Many-to-Many	Primary master object by itself Secondary master object by itself Primary master object with junction object and secondary master object Secondary master object with junction object and primary master object	Primary master object and Secondary master object

Custom report types give you more flexibility to join data from multiple objects, including lookups as well as master-detail relationships.

Video: Building Matrix Reports

This video shows you how easy it is to create matrix reports using report builder.(2 min)

https://www.youtube.com/watch?v=5Lcxh-_U6P8

Extending Salesforce Analytics

There are additional reporting tools that Rob can use to get even more out of Salesforce:

- **Bucket Fields:** Quickly categorize records on a report for grouping and filtering.
- **Cross Filters:** Create WITH or WITHOUT filters based on child records.
- **Joined Reports:** Combine multiple views of data in a single report.
- **Scatter Charts:** Display one or two groups of data plus summaries.

Analytic Snapshots

An analytic snapshot lets you report on historical data.

Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object.

They can then schedule when to run the report to load the custom object's fields with the report's data.

Analytic snapshots enable you to work with report data similarly to how you work with other records in Salesforce.

After you set up an analytic snapshot, users can:

- Create and run custom reports from the target object.
- Create dashboards from the source report.
- Define list views on the target object, if it's included on a custom object tab.

Historical Trending - Report on Historical Changes

- On top of the standard up-to-the-minute reporting on the current state of your business, you can analyze day-to-day and week-to-week changes in opportunities, cases, forecasts, and custom objects.
- History tracking uses a special custom report type designed to highlight changes between five snapshot dates, such as five business days or five business weeks. You can visually represent the data changes in charts and on dashboards.
- Salesforce retains historical data for the previous three months, plus the current month.
- Up to 5 million rows of historical trending data can be stored for each object. Historical data capture stops when the limit is exceeded. The admin is alerted by email when any object reaches 70 percent of the limit, and again if the limit is exceeded.
- Each historical trend report can contain up to 100 fields. In Opportunities reports, this includes the standard preselected fields, which can't be disabled.
- You can specify up to five historical snapshot dates in each historical trend report.
- You can use up to four historical filters on each historical trend report.

Video: Getting Started With Buckets

Learn how to group your data without having to create custom fields! Buckets help you sort, organize and understand large amounts of data in Salesforce quickly and easily. Create your own categories on the fly, without formulas or custom fields. (4 min)

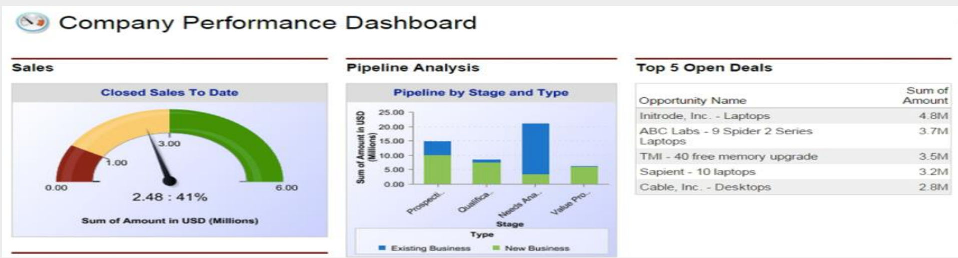
https://www.youtube.com/watch?v=Dq1TkYzT-mM

Dashboards

What is a Dashboard

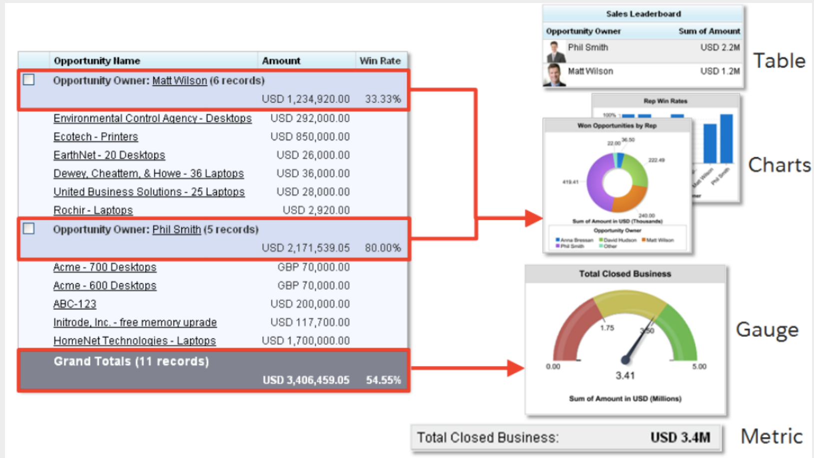
A dashboard:

- Displays data from custom source reports.
- Is comprised of up to 20 components.
- Can use Visualforce pages to present data from other sources.
- Can be scheduled to be refreshed and emailed automatically.
- Has a running user to determine what data is visible.
- Is visible to all users, if enhanced folder sharing is turned on.



Dashboard Components

- Provide a high-level view of reports
- Can take the form of tables, charts, gauges and metrics



Dashboard Components

Tables

Charts

Gauges

Metrics

Tables

A table component:
- Displays data in column form.
- Displays grouping or summary fields of the report.
- Can display more than two columns.


Sales Leaderboard

Opportunity Owner	Sum of Amount
Matt Wilson	570K
Anna Bressan	397K
David Hudson	360K
Jin Chang	135K

NOTE: Tables also support leaderboards in Lightning Dashboards.

Dashboard Components

Tables

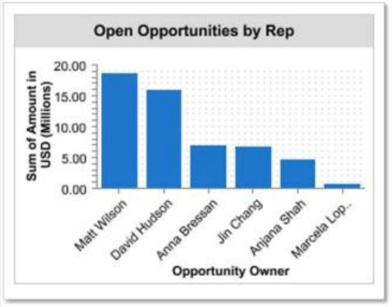
Charts

Gauges

Metrics

Charts

A chart component:
- Displays data graphically.
- Is based on the report data.
- Shows the field that the report is summarized on.



Dashboard Components

Tables

Charts

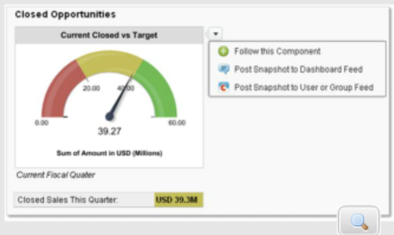
Gauges

Metrics

Gauges

A gauge component:

- Displays a single data value drawn from the grand total of a report.
- Helps show progress towards a goal.
- Can be followed to get notification when a breakpoint is reached.



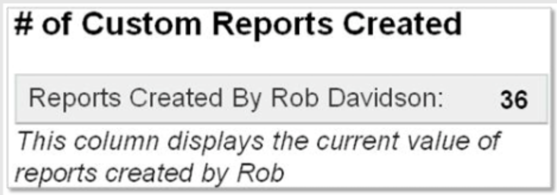
Dashboard Components

- Tables
- Charts
- Gauges
- Metrics

Metrics

A metric component:

- Displays a single data value drawn from the grand total of a report.
- Uses conditional highlighting.



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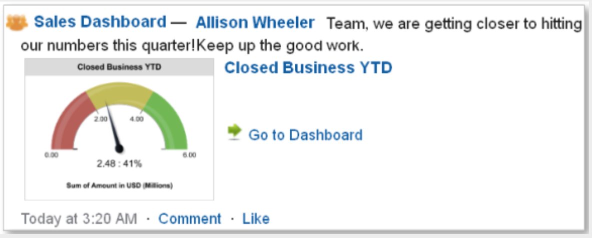
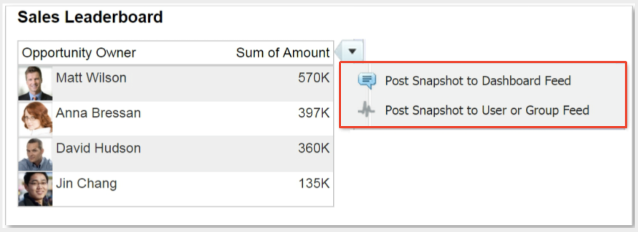
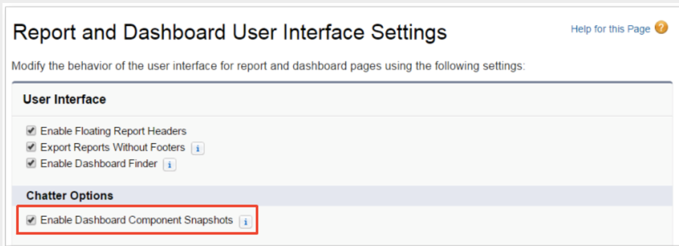
Dashboard Component Snapshots







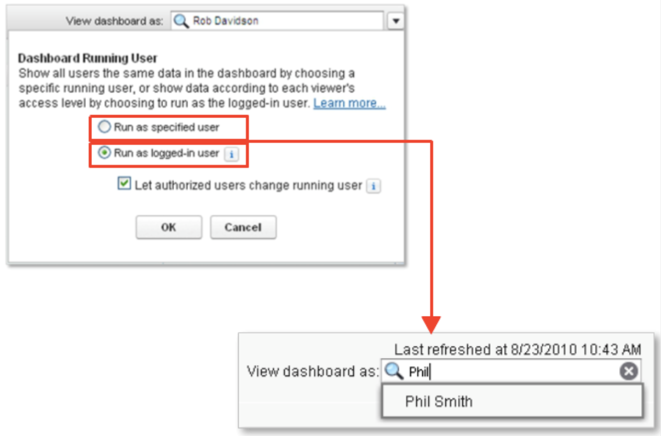
The Running User

The running user determines what data users see.

Dynamic Dashboards

In dynamic dashboards:

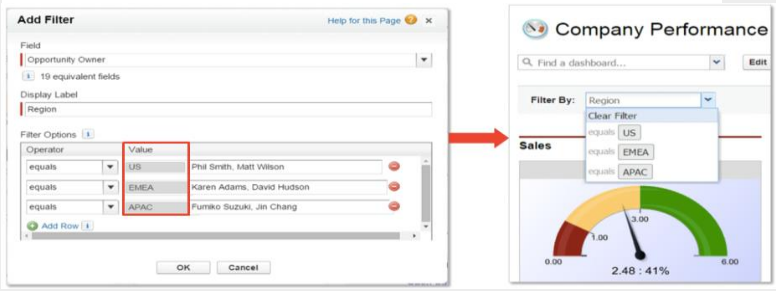
- Data is displayed based on the security settings of the user viewing it.
- There is no need to create multiple dashboards for different users.
- Rob can optionally specify authorized users who can change the running user.



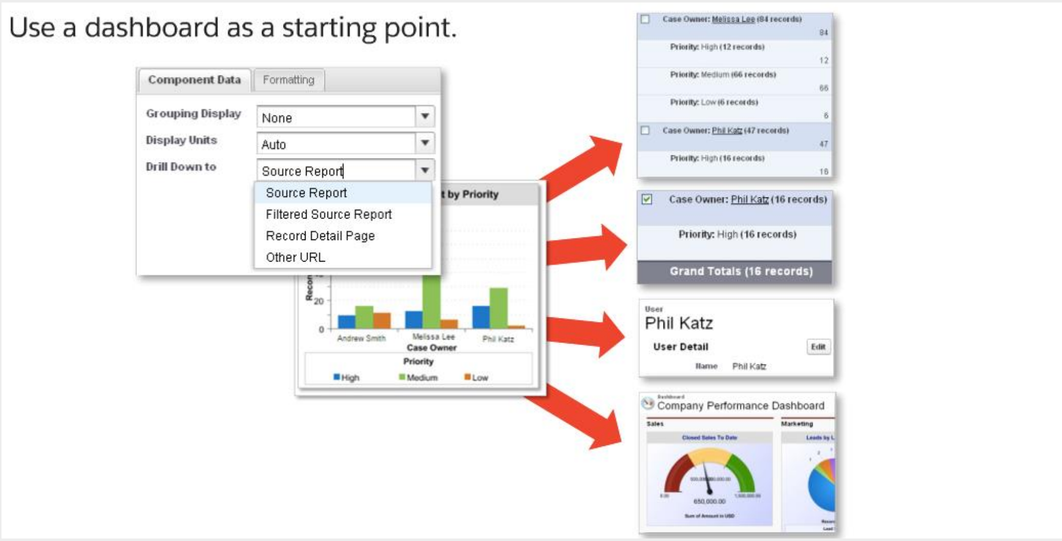
Dashboard Filters

Dashboards:
- Can have up to three filters each.
- Must be based on date, date/time, currency, picklist, lookup, or text fields.

Using dashboard filters:
- Users can view different subsets of data on the same dashboard.
- Users can post Chatter snapshots of dashboard components.
- Scheduled or emailed filtered dashboards display unfiltered data.
- Users cannot add filters to dashboards with Visualforce or s-control components.

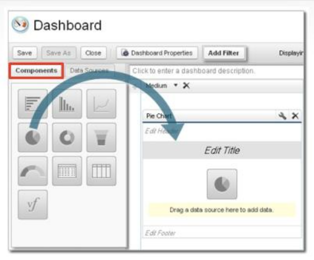


Drilling Down from a Dashboard

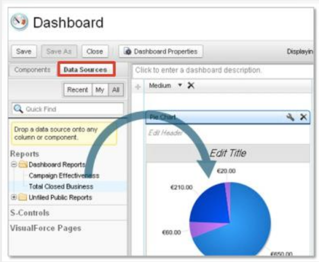


Drag-and-Drop Dashboard Builder

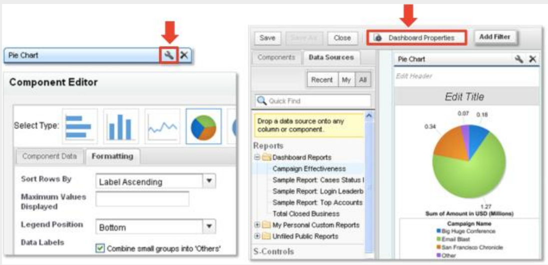
1. Drag a component onto the dashboard canvas



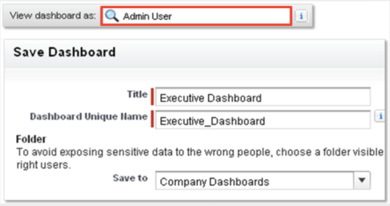
2. Drag the data source on to the component



3. Edit the components and dashboard properties directly through overlays on top of the dashboard



4. Control data visibility by selecting running user



Video: Embedding Charts Anywhere

Learn how to put charts and graphs on your account, contact, and case pages, and more! Salesforce lets you embed charts right on record detail pages, so users can see important information, quickly. You can embed charts on both standard and custom objects. (2 min)

https://www.youtube.com/watch?v=dyrqXtwcPjU

Hands-On Exercise

View the hands on exercise steps in the Administration Essentials for New Admins “Reports and Dashboards” Exercise Guide
https://lms.cfs-api.com/v1/content/2ece95fc-a54e-4cea-901c-c2304537d83a/presentation_content/external_files/ReportsandDashboardsExerciseGuide.pdf

Exercise 7-1: Run and Modify a Report
Exercise 7-2: Create a Simple Custom Report
Exercise 7-3: Create a Matrix Report
Exercise 7-4: Use Filters and Filter Logic in a Report
Exercise 7-5: Create a Custom Report
Exercise 7-6: Filter a Report with Relative Date Values
Exercise 7-7: Add a Custom Summary Formula
Exercise 7-8: Add Highlights and a Chart
Exercise 7-9: Schedule and Email a Report
Exercise 7-10: Create Custom Adoption Reports
Exercise 7-11: Build a Global Sales Dashboard
Exercise 7-12: Create a User Adoption Dashboard

- Link is also in Video

Video: Dashboards Overview & Chatter

This demo covers some key dashboard features, such as changing the visual display, changing drill down options, and creating dynamics dashboards, so sales managers and team members can use one dashboard to track their team's or individual performance. (4 min)

https://www.youtube.com/watch?v=a6lCrNnotiY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Thank you