

Admin Workshop Lesson 3

Collaborating with Chatter
Analyzing Data with Reports and Dashboards





Objective

- **Email Templates**

- **Collaborating with Chatter**

- How does it 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



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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

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

- Define different sets of values for Standard and Custom picklist fields



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

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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”



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.

The screenshot shows the 'Public Folder Access' settings for a folder. At the top, there's a dropdown menu set to 'Read Only'. Below it, another dropdown menu is open, showing three options: 'This folder is accessible by all users', 'This folder is hidden from all users', and 'This folder is accessible only by the following users'. The third option is selected. A search bar labeled 'Search:' with 'Roles' typed in is followed by a 'Find' button. A list of roles is displayed, with 'Role: Human Resources Director' currently selected. To the right, a 'Shared To' section shows a list labeled '-None-' with 'Add' and 'Remove' buttons. The entire interface is contained within a light gray box.



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



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

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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.

The screenshot shows the Chatter profile page for a user named Allison Wheeler. At the top, there's a navigation bar with 'Chatter > People > Allison Wheeler'. Below the navigation is a header with a photo of Allison, her name, and tabs for 'Feed' and 'Overview'. To the right are buttons for 'Start Chat' and 'Send a message'. A 'Share' button is also present. The main content area includes a video thumbnail with a play button, a contact section with basic info like title and email, and a feed of posts. One post from Yuko Ishikawa is highlighted with a red box around its file attachment. The attachment is a file named 'Mod 6 Yukos File for Region and Zones for Technology Industry.xlsx'.



Chatter Benefits

Bringing the functionality of your social network to your workload

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

The screenshot shows the Salesforce Chatter feed with a blue header bar labeled 'Information Revolution'. On the left, there's a sidebar with icons for 'files', 'expertise', and 'conversations'. The main feed area has a search bar at the top. A post from 'Kathy Cooper' dated 'Monday April 21, 2014' is shown, with options to 'Post', 'File', 'New Task', and 'More'. The post content is: 'Developing some up to date training on shared sales tip across all our regions.' Below it, a comment from 'Matt Wilson' to 'Kathy Cooper' says: 'Hello, I submitted a discount approval request one week ago, but it hasn't been approved yet. Is there a reason for that? I'm trying to get it approved so I can move forward with the campaign.' A third comment from 'Conner McCoy' to 'Kathy Cooper' says: 'Our new web site looks fantastic! Thanks to @KathyCooper and @Alan Wong for the great first blog entries. Next up, how do we funnel all that traffic into our pipeline?' The interface includes standard social media controls like 'Comment', 'Like', and 'Share'.





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



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.

The screenshot shows the Salesforce Chatter Groups interface. At the top, there's a navigation bar with Home, Chatter, Profile, People, Groups (which is the active tab), Files, and a plus sign. Below the navigation is a sidebar with 'Groups' and 'New Group' buttons, followed by 'Recently Viewed' sections for 'My Groups', 'Active Groups', and 'My Archived Groups'. A red box highlights the 'My Groups' section. To the right, there's a search bar with 'Type a Group Name ...', and columns for 'Group', 'Last Activity', and 'Membership'. On the far right, there's a 'Recommendations' sidebar with options to 'Complete your profile', 'Tell everyone about yourself and upload a photo', and a 'Skip >' button. The main content area displays four group cards: 'All AW Computing' (30 members, last activity Jul 14, owner Toby Rourke), 'All Sales' (1 member, last activity Apr 19, owner Toby Rourke), 'Beat Targas!' (8 members, last activity Apr 15, owner Allison Wheeler), and 'Spider Series Laptop' (15 members, last activity Apr 15, owner Allison Wheeler). Each card includes a brief description and membership details.



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 browser.
- 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):



Course: 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. Join the conversation today! Mobile? Take th...

Items - 1 · 35 mins · Collaboration Cloud · Standard, Support



MODULE

Getting a Head Start with Chatter

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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 browser.
- 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):

The screenshot shows a course card for 'Administration Essentials for New Admins'. The title is highlighted with a red oval. Below it, a description states: 'Administration Essentials for New Admins is a thorough introduction to the setup and configuration of the Salesforce application. Using explanation, demonstration, and hands-on exercises, the course guides you through topics that are critical for adm...'. It also mentions 'Items - 8 • 355 mins • Force.com, Sales Cloud, Service Cloud • Premier - Partner'. To the right, a sidebar titled 'MODULE' lists three items: 'Overview', 'Getting Your Organization Ready for Users' (which is also circled in red), and 'Setting Up and Managing Users'.

- 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=a1S30000000gIS6EA1>





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/y1/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 browser.
- 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 :)

 Course **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 im...
Items ~ 1 • 15 mins • Collaboration Cloud • Standard

- 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

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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

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Video – Reports and Dashboards

Learn the basics of reporting in Salesforce, including how to create standard and custom reports by using different report types and filter criteria. In addition, you'll learn about creating custom summary formulas, using dashboards to display your results, and enhancing reports with charts and highlighting. (53 min)

- Running and modifying Reports
- Creating new reports with the report builder
- Working with report filters and filter logic
- Summarizing with formulas and visual summaries
- Printing, exporting and emailing reports
- Building dashboards

[Link to Video: See next slide](#)



- Play “Building dashboards” later



Video – Reports and Dashboards

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- To avoid a mixup with saved credentials open a private window in a new browser.
- 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 :)

The screenshot shows a course card for "Administration Essentials for New Admins". The card includes a video thumbnail, the course title, a brief description, and course details like items, duration, and categories. A red oval highlights the course title "Administration Essentials for New Admins".

Course: **Administration Essentials for New Admins**
Administration Essentials for New Admins is a thorough introduction to the setup and configuration of the Salesforce application. Using explanation, demonstration, and hands-on exercises, the course guides you through topics that are critical for adm...
Items - 8 • 355 mins • Force.com, Sales Cloud, Service Cloud • Premier - Partner



MODULE
Overview
Getting Your Organization Ready for Users
Setting Up and Managing Users
Security and Data Access
Customization: Fields
Managing Data
Reports and Dashboards
Automation

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- 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
- Summary Report is based certain on columns can be created using the summary format
- Matrix Reports displays formats like pivot tables , as groupings and summaries

First Name	Last Name	Mailing Street	Mailing City
Jake	Thomas	1200 Broadway	New York
Jill	Wansford	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 Culture	Rungis Cedex
Richard	Kee	30-2, Shimomaruko 3-Chome	Ohta-ku
Leanne	Tomlin	1350 Charleston Rd.	New York
Jay	Yanticy	334 Market Street	SF

Opportunity Name	Amount	Close Date
<input type="checkbox"/> Stage: Prospecting (2 records)		
Universal Motors - Leadbox	USD 5,341,500.00	
Entex Media - Leadbox	USD 3,564,000.00	12/7/2010
<input type="checkbox"/> Stage: Qualification (2 records)		
Starfish Publishing - Leadbox	USD 1,837,500.00	12/5/2010
<input type="checkbox"/> Stage: Value Proposition (1 record)		
ZIFCore - Leadbox	USD 4,561,250.00	
Grand Totals (7 records)	USD 21,162,750.00	

Preview	Matrix Format	Show	Add Chart	Remove All Columns
	Opportunity Name	Arme Inc - 6 Star 10 Series Desktops	American Parks	
	Stage	Closed Won	Subtotal	Closed Won
Age	Last Modified By	Drop summarizable fields into the matrix.		
Rob Davidson		USD 140,000.00 2011 Record Count 1	USD 140,000.00 2011 Record Count 1	USD 10,000.00 2011 Record Count 1
		Amount	USD 140,000.00 2011 Record Count 1	
		Fiscal Year		
		Amount		USD 10,000.00 2011 Record Count 1
		Fiscal Year		
		Record Count		





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.

The screenshot shows a list of standard reports under the heading "Account and Contact Reports". The reports listed are: "Account History Report" (What is the data history of my account fields?), "Account Owners" (Who owns which accounts?), and "Accounts with last activity > 30 days" (Which accounts need attention?).

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.

The screenshot shows a list of custom reports under the heading "Custom Sales Reports". The reports listed are: "Open Opportunities by Rep" (What does each rep have in the pipeline?) and "Opportunity Win Rate by Rep" (How well are my reps closing?).



- **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

The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with a search bar and a 'Folders' section containing 'All Folders' and a list of various reports and dashboards. A red box highlights the 'New Report Folder' and 'New Dashboard Folder' buttons at the top of this list. The main area shows a 'Public Folder Access' dropdown menu open, with 'Read Only' selected. Below it is a list of sharing options:

- This folder is accessible by all users
- This folder is hidden from all users
- This folder is accessible only by the following users:

A dropdown menu for 'Available for Sharing' lists 'Role and Subordinates: Accounts Receivable' and 'Role and Subordinates: CEO'. At the bottom of the interface, there are two buttons: 'Role and Subordinates' and 'Share'.



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.

Share: Global Sales Reports

Help for this Page ? x

Share with: [Users](#), [Roles](#), [Roles and Subordinates](#), and [1 more](#) ▾

All (4)	Access
APAC Sales Director Role	Viewer ▾
EMEA Sales Director Role	✓ Viewer
US Sales Director Role	Editor
VP of Global Sales/Sales Ops Role	Manager
Viewer ▾	

[Close](#)



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 screenshot shows the 'Opportunity Pipeline' report page. At the top, it displays 'Report Generation Status: Complete' and 'Role (Show Hierarchy): CEO'. Below this is a 'Report Options' section. A dropdown menu labeled 'Summarize information by:' is set to 'Stage'. To its right is a 'Time Frame' section with a 'Date Field' dropdown set to 'Close Date' and a 'Range' dropdown set to 'Current FQ'. Underneath these are 'From' and 'To' date fields, both set to '1/1/2014' and '3/31/2014' respectively. Further down, there's a 'Show' dropdown menu with options: 'All opportunities' (selected), 'My opportunities', 'My team's opportunities', and 'All opportunities'. Next to it are two dropdown menus: 'Opportunity Status' set to 'Open' and 'Probability' set to 'All'. Below these controls are several buttons: 'Details', 'Customize', 'Save As', 'Printable View', and 'Export Details'. The 'All opportunities' option in the 'Show' dropdown and the 'Open' and 'All' options in the status/probability dropdowns are highlighted with a red border.

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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.

The screenshot shows the Salesforce Report Builder interface. On the left, there's a sidebar titled 'Fields' with sections for 'Formulas', 'Bucket Fields', and 'Opportunity Information'. Under 'Opportunity Information', various fields like 'Created By', 'Last Modified By', and 'Opportunity Name' are listed. The main area has tabs for 'Preview', 'Summary Format', and 'Show'. A 'Filters' section at the top includes dropdowns for 'Show' (All opportunities), 'Opportunity Status' (Open), and 'Probability' (All). Below the filters, there's a date range selector for 'Close Date' from '7/1/2012' to '9/30/2012'. The 'Preview' tab displays a table with columns for 'Opportunity Owner', 'Account Name', and 'Opportunity Name'. A message 'Drop a field here to create a grouping.' is visible above the preview data. The preview data shows 7 records:

Opportunity Owner	Account Name	Opportunity Name
Matt Wilson	Arbuckle Laboratories	Arbuckle Laboratories - 8 Star 10 Series Desktops
Matt Wilson	Nizu-WorldHQ	Nizu-WorldHQ - 17 Spider 2 Series Laptops
David Hudson	Starlux Hotels & Resorts	Starlux Hotels & Resorts - Desktops
Anna Bressan	West Airlines	West Airlines - 10 AW 5000 Series Printer
Matt Wilson	Dizon.net	Dizon.net - free memory upgrade
Matt Wilson	EarthNet	EarthNet - Laptops

- 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
<u>Acme-NY</u>	1350 Charleston Rd.	New York	NY	31345
<u>Cable Inc.</u>	1515 Broadway	New York	NY	10035
<u>Firefly Insurance</u>	55 East 5th Street	NY	NY	10003
<u>Installese Inc.</u>	22 5th Ave	New York	NY	10998
<u>Jam Television</u>	5150 Broadway	New York	NY	10022
<u>Service Style</u>	5566 Main Street	New York	NY	10993
<u>Starlux Hotels & Resorts</u>	1111 Westrun Blvd	White Plains	NY	10604
<u>TMI Inc</u>	1234 Westcentral Ave	White Plains	NY	10604
<u>ZiffCorp</u>	75 Rockefeller Plaza	New York	NY	10019

Grand Totals (9 records)





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
Tarsun Stores, Inc.	2446 Tarsun Way	Oakland	CA	95134



- 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.

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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 7-12: 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	Amount	Close Date	Stage
<input type="checkbox"/> Opportunity Owner: Jin Chang (5 records)			
Ferris Media - Laptops	USD 6,900,000.00		
Global Print Media - 9 Spider 2 Series Laptops	USD 1,250,000.00	12/13/2013	Needs Analysis
Intron - free memory upgrade	USD 3,650,000.00	12/17/2013	Needs Analysis
Canson - 15 Spider Series 3 Laptops	USD 50,000.00	11/26/2013	Proposal/Price Quote
Arbuckle Laboratories - Laptops	USD 150,000.00	12/18/2013	Needs Analysis
<input type="checkbox"/> Opportunity Owner: Anjana Shah (3 records)			
HomeNet Technologies - Laptops	USD 1,800,000.00	12/16/2013	Qualification
TMI - 40 free memory upgrade	USD 4,565,250.00	12/21/2013	Prospecting
Ecotech Germany - 10 Spider 3 Series Laptops	USD 3,504,000.00	12/19/2013	Proposal/Price Quote
Grand Totals (8 records)			
USD 11,465,250.00			





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
<input type="checkbox"/> 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
<input type="checkbox"/> 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
<input type="checkbox"/> Stage: Proposal/Price Quote (1 record)		USD 50,000.00	
Admin User	ABC- 10 Laptops	USD 50,000.00	1/25/2010
<input type="checkbox"/> 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	

Floating Report Headers



Owner	From Stage	To Stage	Amount	Probability (%)
Bressan				
Matt Wilson	Prospecting	Negotiation/Review	USD 1,500,000.00	90%
Matt Wilson	-	Prospecting	USD 5,000.00	10%
Matt Wilson	Value Proposition	Value Proposition	USD 750,000.00	50%

Opportunity Name	Amount
Opportunity Owner: Phil Smith (21 records)	
Nizu-WorldHQ - 17 Spider 2 Series Laptops	USD 20,000.00
Canson - 18 Spider 3 Series Laptops	USD 383,250.00

Opportunity Name	Amount
Opportunity Owner: Phil Smith (21 records)	
USD 19,187,119.38	
Canson - 18 Spider 3 Series Laptops	USD 383,250.00

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	
<input type="checkbox"/>	Admin User	USD 0.00	USD 50,000.00	USD 40,000.00	USD 90,000.00
	<u>ABC- 10 Laptops</u>		USD 50,000.00		
	<u>TMI - 40 Printers</u>			USD 40,000.00	
<input type="checkbox"/>	David Hudson	USD 0.00	USD 750,000.00	USD 0.00	USD 750,000.00
	<u>Starlux Hotels & Resorts - Desktops</u>		USD 750,000.00		
<input type="checkbox"/>	Matt Wilson	USD 73,000.00	USD 0.00	USD 32,000.00	USD 105,000.00
	<u>Smithee Telephony Integration</u>	USD 28,000.00			
	<u>Smithee Knowledge Implementation</u>	USD 45,000.00			
	<u>Starlux Telephony Integration</u>			USD 32,000.00	
<input type="checkbox"/>	Phil Smith	USD 0.00	USD 1,095,000.00	USD 1,000,000.00	USD 2,095,000.00
	<u>Starfish Publishing- Desktops</u>		USD 1,095,000.00		
	<u>ABC-123</u>			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



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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- 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.

The screenshot shows a report interface with a sidebar containing various summary fields like 'Sum of Amount' and 'Record Count'. A dropdown menu is open at the top, showing options to 'Sort Group Ascending', 'Sort Group Descending', and 'Group Dates By'. The 'Group Dates By' option is highlighted with a red box and has a dropdown arrow pointing to a list of grouping options: Day, Calendar Week, Calendar Month (which is checked with a checked icon), Calendar Quarter, Calendar Year, Fiscal Quarter, Fiscal Year, Calendar Month in Year, and Calendar Day in Month. Red arrows point from the checked 'Calendar Month' option to three separate report snippets on the right, each showing grouped data for different time periods.

Opportunity Owner: Phil Smith (8 Records)

Close Date: 3/20/2011 - 3/26/2011 (1 Record)

Close Date: 4/10/2011 - 4/16/2011 (2 Records)

Opportunity Owner: Phil Smith (8 Records)

Close Date: March 2011 (1 Record)

Close Date: April 2011 (3 Records)

Opportunity Owner: Phil Smith (8 Records)

Close Date: Q1 CY2011 (1 Record)

Close Date: Q2 CY2011 (7 Records)

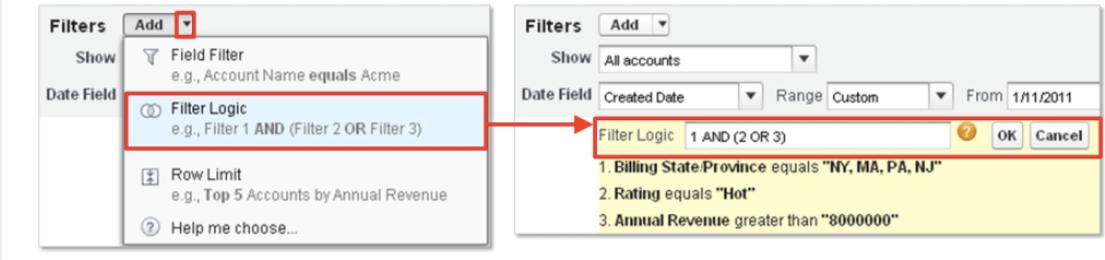


Report Filters and Filter Logic



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
last week

today
this month

tomorrow
next quarter

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

last *n* days
next *n* days

last *n* quarters
next *n* quarters

last *n* years
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



Hands-On Exercise



View the hands on exercise steps in the Administration Essentials for New Admins “Reports and Dashboards” Exercise Guide
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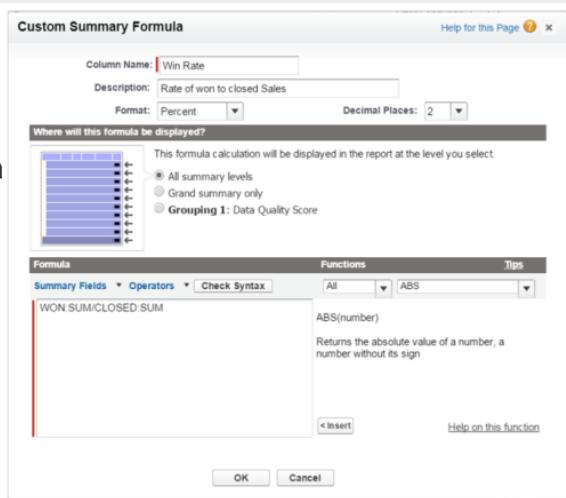
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- Link is also in Video

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



salesforce

salesforce

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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- Link is also in Video

Adding Conditional Highlighting to a Report



Highlight exceptional values in key fields to make them stand out.



"I'd like to be able to quickly pick out who's closing and who isn't, and compare win rates across all reps."

Allison Wheeler,
VP of Global Sales

Opportunity Name	Amount	Win Rate
<input type="checkbox"/> Opportunity Owner: David Hudson (5 records)	USD 2,501,716.49	60.00%
Sapient - 10 laptops	GBP 10,000.00	
Sapient - 10 Free Memory Upgrade Laptops	GBP 10,000.00	
HealthLife - Desktops	USD 1,125,000.00	
Arbuckle - 1400 desktops	USD 140,000.00	
Arbuckle Laboratories - Laptops	USD 1,204,500.00	
<input type="checkbox"/> Opportunity Owner: Matt Wilson (13 records)	USD 4,316,420.00	46.15%
Dewey, Cheattem, & Howe - 36 Laptops	USD 36,000.00	
salesforce.com - 500 free memory upgrade	USD 50,000.00	
salesforce.com - 1,000 free memory upgrade	USD 100,000.00	
salesforce.com - 40 Laptops	USD 40,000.00	
Jam Television - Platinum Support	USD 1,500.00	



- 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.

Chart Editor

Select Type:

Chart Data **Formatting**

X-Axis: Sum of Amount

Y-Axis: Opportunity Owner

Group By:



"I'd like to see the sales rep win rates presented in a chart."

Allison Wheeler,
VP of Global Sales



Hands-On Exercise



View the hands on exercise steps in the Administration Essentials for New Admins “Reports and Dashboards” Exercise Guide
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- Link is also in Video

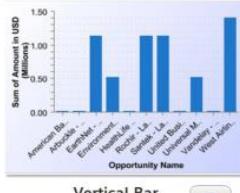
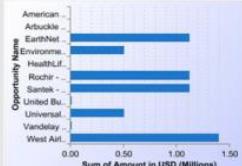


Chart Types: Single Groupings

Bar 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.



Line Charts

Pie/Donut Charts

Funnel Charts

Scatter Charts





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.

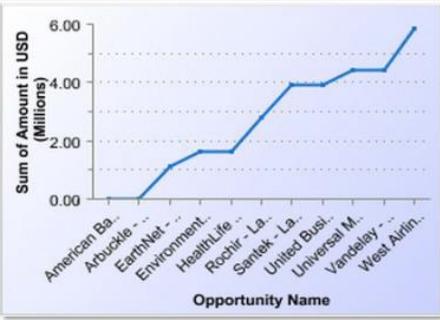




Chart Types: Single Groupings

Bar Charts

Line Charts

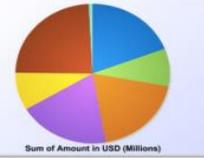
Pie/Donut Charts

Funnel Charts

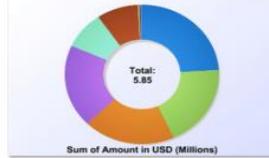
Scatter Charts

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





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.

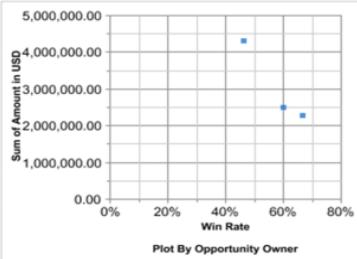




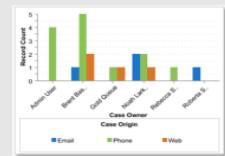
Chart Types: Multiple Groupings

Side-by-Side Bar

Side-by-Side Bar

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

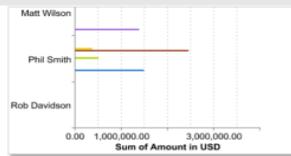
Stacked Bar



Stacked to 100% Bar

Grouped Line

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.

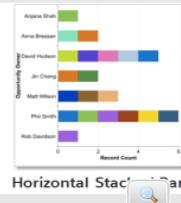
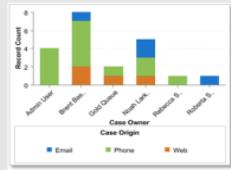




Chart Types: Multiple Groupings

Side-by-Side Bar

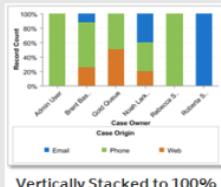
Stacked Bar

Stacked to 100% Bar

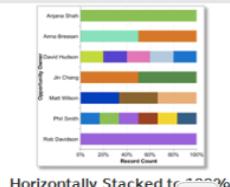
Grouped Line

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

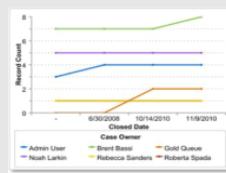
Side-by-Side Bar

Stacked Bar

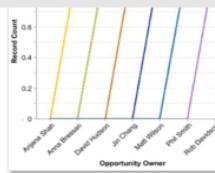
Stacked to 100% Bar

Grouped Line

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



Grouped: Line



Line: Grouped Cumulative



Printing and Exporting Report Results

The screenshot shows the Salesforce report builder interface. At the top, there are 'Report Options' and a 'Time Frame' section. Below these are filtering options for 'Show' (All opportunities, Open, All), 'Opportunity Status' (Open), and 'Probability' (All). There are buttons for 'Run Report', 'Hide Details', 'Customize', 'Save', 'Save As', 'Delete', 'Printable View', and 'Export Details'. The 'Printable View' and 'Export Details' buttons are highlighted with a red box and arrow. A data grid displays opportunity information with columns: Opportunity Name, Type, Lead Source, Amount, Close Date, Next Step, Probability (%), and Fiscal Period. An 'Export Report' dialog is open over the grid, showing 'Export File Encoding' set to ISO-8859-1 (General US & Western) and 'Export File Format' set to Excel Format.xls. Other options include Comma Delimited.csv and Excel Format.xlsx. Buttons for 'Export' and 'Done' are at the bottom of the dialog.

- 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.

The screenshot shows an email window with the subject "Report: Opportunities by Rep run at 8/4/2010 8:06 AM". The body of the email displays a report titled "Opportunities by Rep" with the following details:
Run as: Allison Wheeler
Run at: 8/4/2010 8:06 AM
Filtered By:

- View: All opportunities
- Opportunity Status: Open
- Probability: All

The report table has columns for Opportunity Name, Type, and Lead Source. The data is as follows:

Opportunity Name	Type	Lead Source
Opportunity Owner: Admin User (7 records)	-	-
ABC- 10 Laptops	-	Advertisement
Acme Inc.-Desktop	-	New Business
ZiffCorp - Laptops	Lead	Partner



Hands-On Exercise



View the hands on exercise steps in the Administration Essentials for New Admins “Reports and Dashboards” Exercise Guide

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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

This folder is accessible by all users
This folder is hidden from all users
This folder is accessible only by the following users:

Search: Roles for: Find

Available for Sharing Shared To

Role: Accounts Receivable Role: VP of Global Sales

Role: CEO

Role: Consulting Director

Role: Consulting Partner

Role: Consulting Rep

Role: Customer Support Director

Add

What data can user see in a report?

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

- **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>





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**](https://www.youtube.com/watch?v=Dq1TkYzT-mM)



Dashboards

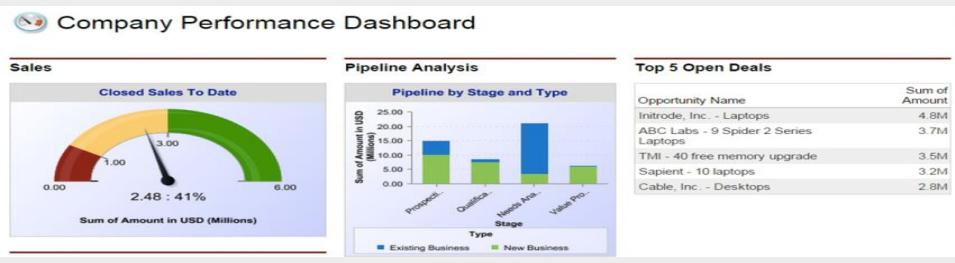
salesforce



What is a Dashboard

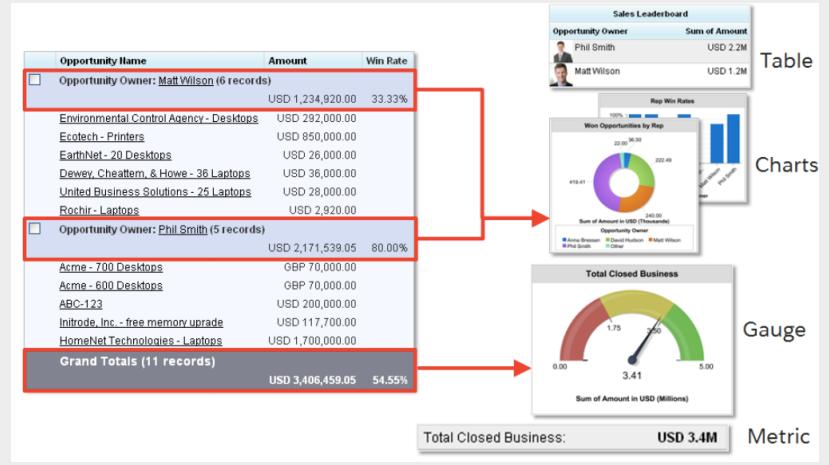
A dashboard:

- 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



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Dashboard Components

Tables

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

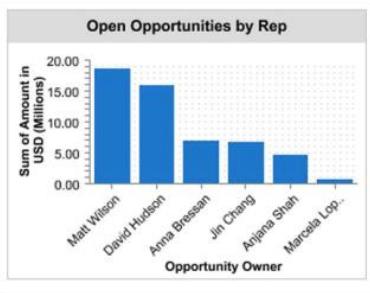
Gauges

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.

of Custom Reports Created

Reports Created By Rob Davidson: 36

This column displays the current value of reports created by Rob



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



Dashboard Component Snapshots

Sales Dashboard — Allison Wheeler Team, we are getting closer to hitting our numbers this quarter! Keep up the good work.

Closed Business YTD

Sum of Amount in USD (Millions)

Go to Dashboard

Today at 3:20 AM · Comment · Like

Sales Leaderboard

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



Post Snapshot to Dashboard Feed

Post Snapshot to User or Group Feed

Report and Dashboard User Interface Settings

Help for this Page ?

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

User Interface

- Enable Floating Report Headers
- Export Reports Without Footers i
- Enable Dashboard Finder i

Chatter Options

- Enable Dashboard Component Snapshots i



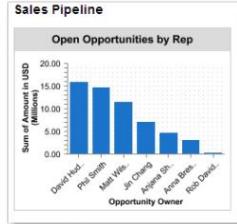


The Running User

The running user determines what data users see.



Allison Wheeler,
VP of Global Sales



Allows users to view summarized data they
might not normally have access to.

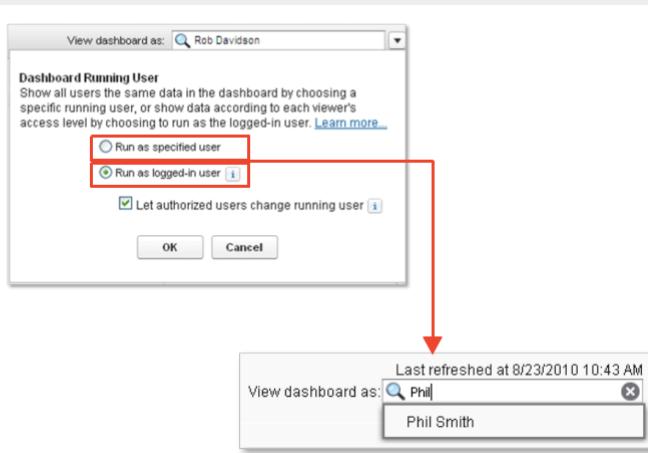


Dynamic Dashboards



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.

The screenshot illustrates the process of applying filters to a dashboard. On the left, a modal window titled 'Add Filter' shows a dropdown for 'Field' set to 'Opportunity Owner' and a 'Display Label' input field containing 'Region'. Below these are 'Filter Options' with three rows: 'equals US' (selected), 'equals EMEA', and 'equals APAC'. An 'OK' button is at the bottom. A red arrow points from this dialog to the right side of the screen, where a 'Company Performance' dashboard is displayed. The dashboard has a 'Find a dashboard...' search bar and an 'Edit' button. It features a 'Filter By: Region' dropdown menu with options: 'Clear Filter', 'equals US' (selected), 'equals EMEA', and 'equals APAC'. Below the filter menu is a gauge chart with a needle pointing to '2.48 : 41%'.





Drilling Down from a Dashboard

Use a dashboard as a starting point.

The diagram illustrates the drilling down process from a dashboard to a report and then to a user detail page. It consists of three main components:

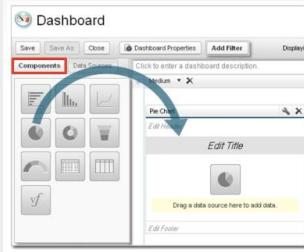
- Dashboard Component:** Shows a bar chart titled "Cases by Priority" with data for Andrew Smith, Melissa Lee, and Phil Katz across High, Medium, and Low priority levels. A dropdown menu under "Drill Down to" shows options: Source Report, Filtered Source Report, Record Detail Page, and Other URL. The "Source Report" option is selected.
- Report Component:** Displays a list of records grouped by Case Owner (Melissa Lee and Phil Katz) and Priority (High, Medium, Low). The count for "Case Owner: Phil Katz (16 records)" is highlighted in blue, indicating it is the current selection. Red arrows point from the dashboard's "Source Report" option to this component.
- User Detail Component:** Shows a "User Detail" page for "Phil Katz" with fields for Name and Edit. Red arrows point from the report's "Grand Totals (16 records)" section to this component.



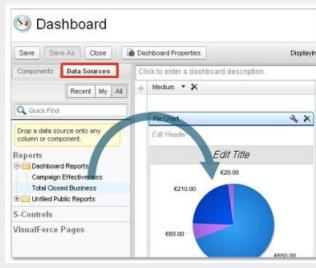


Drag-and-Drop Dashboard Builder

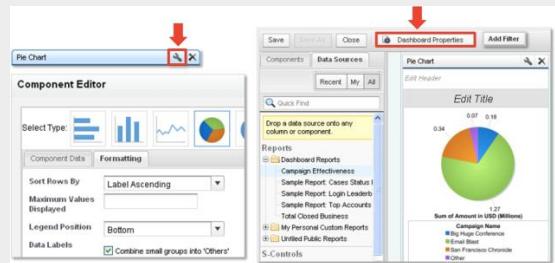
1. Drag a component onto the dashboard canvas



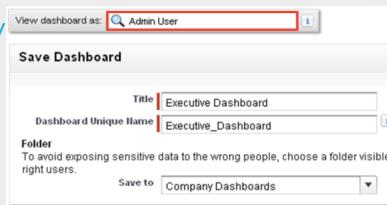
2. Drag the data source onto the component



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



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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=a6lCrNnooY>



The Salesforce logo, which consists of the word "salesforce" in a lowercase, sans-serif font inside a white cloud-like shape.

salesforce

**Thank
you**