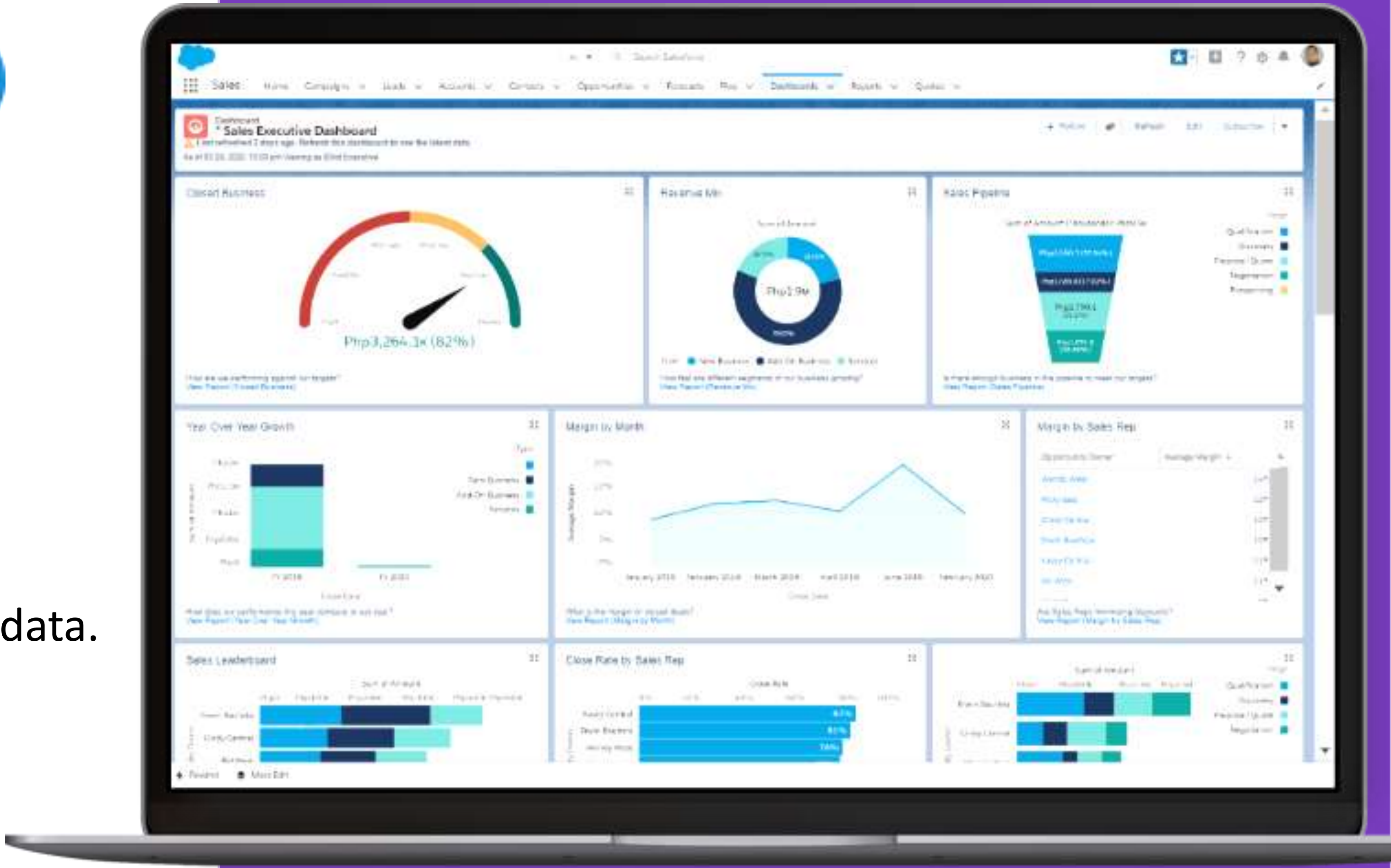
Salesforce Reports & Dashboards Fast Track

How to get a real-time view of your business data.



THANK YOU

ERWIN E. BAUTISTA

Salesforce Lead Consultant

Professional

- Former Salesforce Success Specialist
- 6x Salesforce Certified
- Trailhead Ranger

https://www.linkedin.com/in/erwin-e-bautista/
https://twitter.com/iamErwinB

Personal

- Dad to 3 boys; husband to 1 wife
- Genuinely fascinated with numbers and patterns
- Loves everything mocha

What if…?

AGENDA

Our Goals
- What knowledge this session aims to impart

The Fundamentals of a Report
- Basic elements that drive a Salesforce Reports

Lightning Report Builder Demo
- Creating your first few Sales Reports

The Fundamentals of a Dashboard
- Adding report, choosing components, storing and sharing

Dashboard Build Demo
- Putting your Sales Reports together

Beyond the Basics
- Your business data and **YOU**

Our Goals

What knowledge this session aims to impart

This session aims to help you …

- get (re)acquainted with the basic elements of Salesforce Reports and Dashboard

This session aims to help you …

- get (re)acquainted with the basic elements of Salesforce Reports and Dashboard
- learn how you can have real-time visibility of your business data in Salesforce

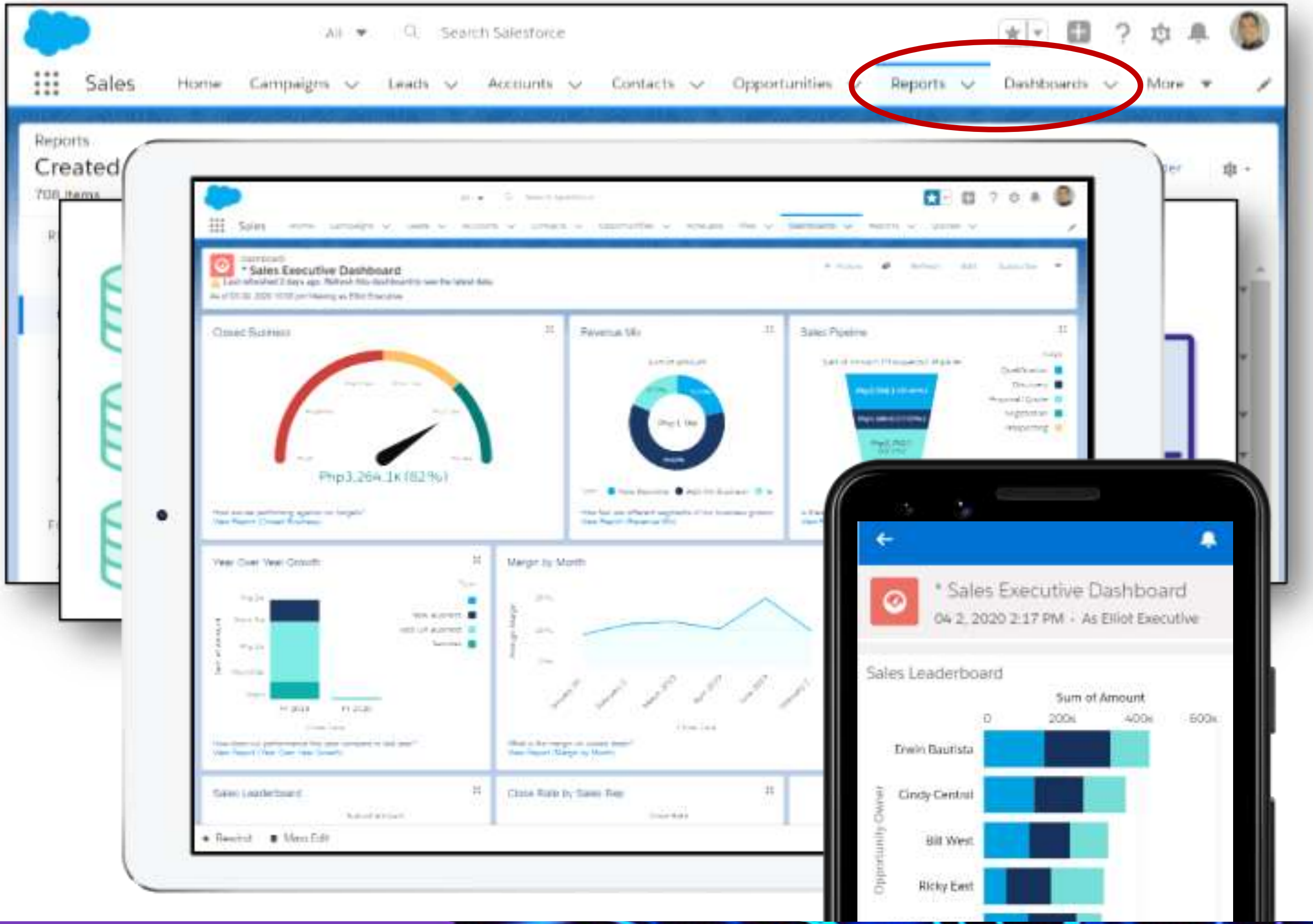
This session aims to help you …

- get (re)acquainted with the basic elements of Salesforce Reports and Dashboard
- learn how you can have real-time visibility of your business data in Salesforce
- skill up for furthering your career in the Salesforce Ecosystem

Why?

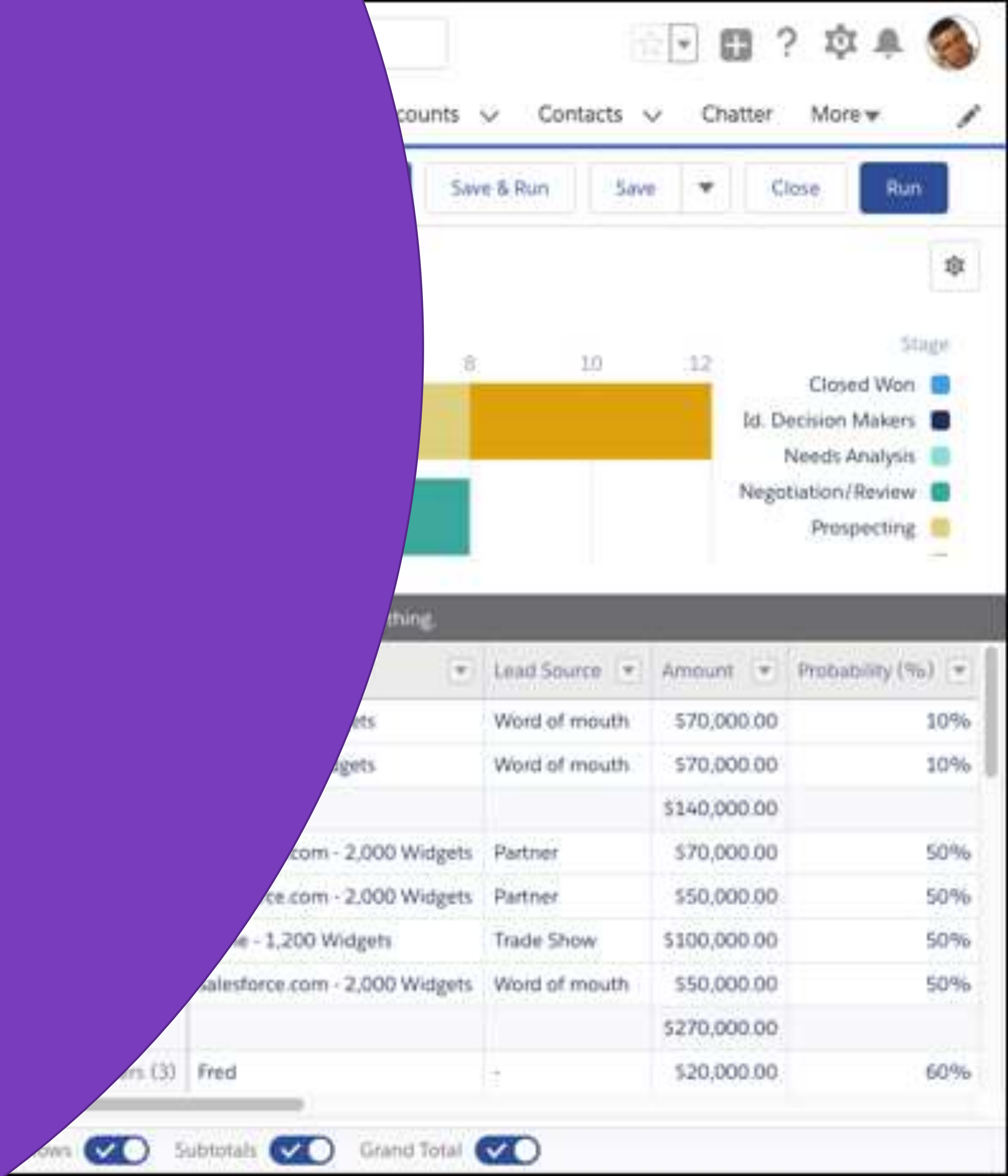
3 Reasons to Start Utilizing Salesforce Reports and Dashboards

- Out-of-the-box tools
- No ETL required
- View and Share On-Demand



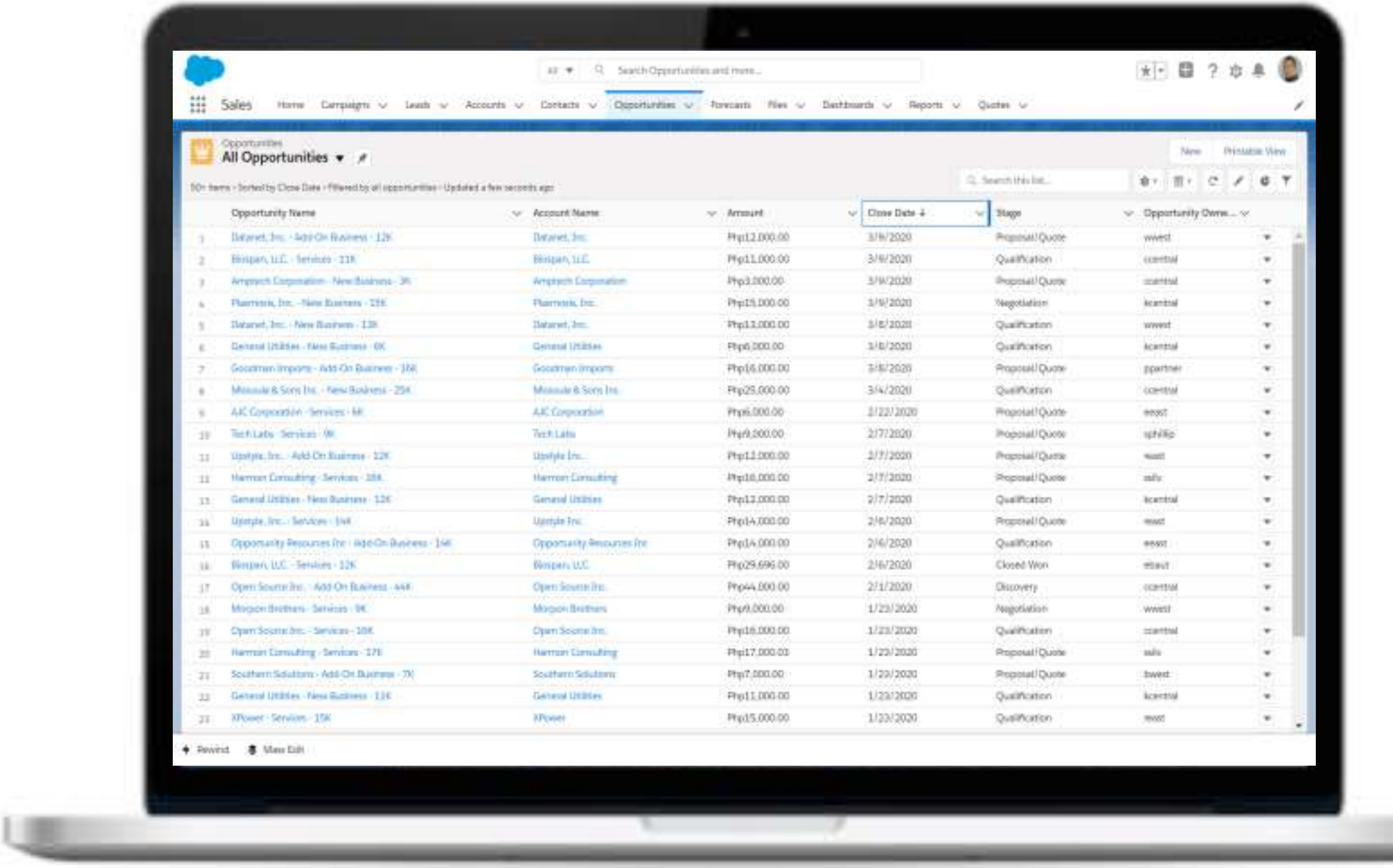
The Fundamentals of a Report

Basic elements that drive a Salesforce Report



It All Begins with Data

- Is that data in your Salesforce org?
- Do you have a field for that?
- Do users have access to those fields?



Three Elements That Drive Every Report

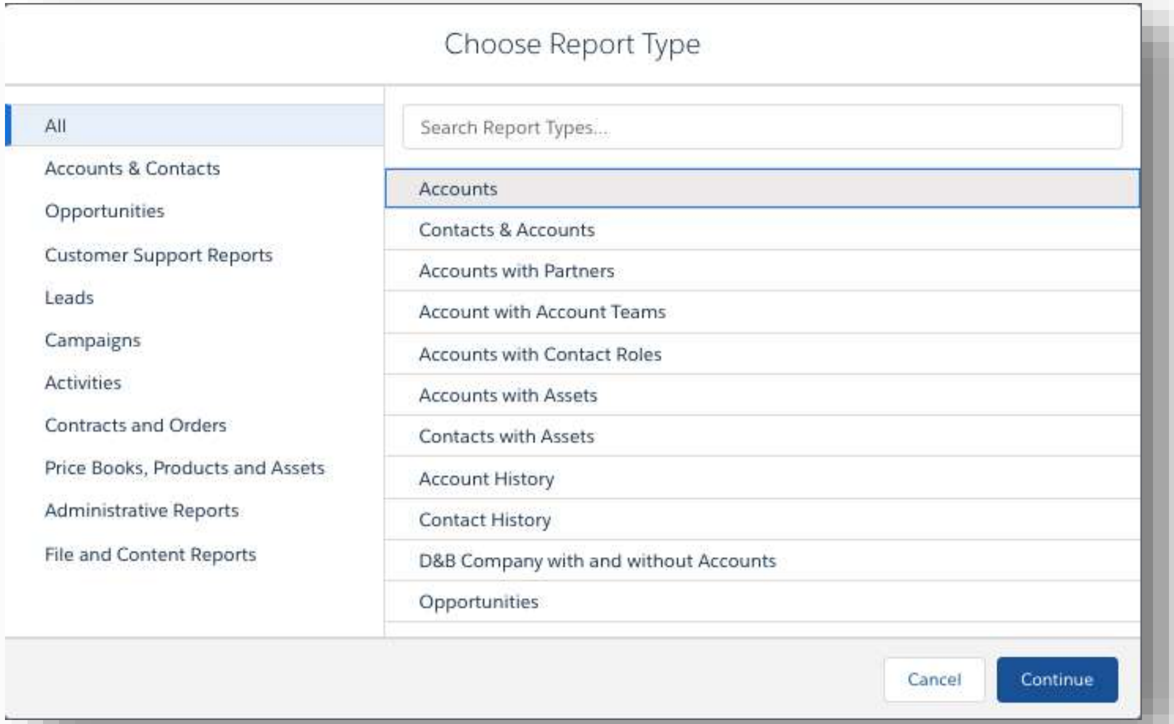
1. Report Type

2. Filter Criteria

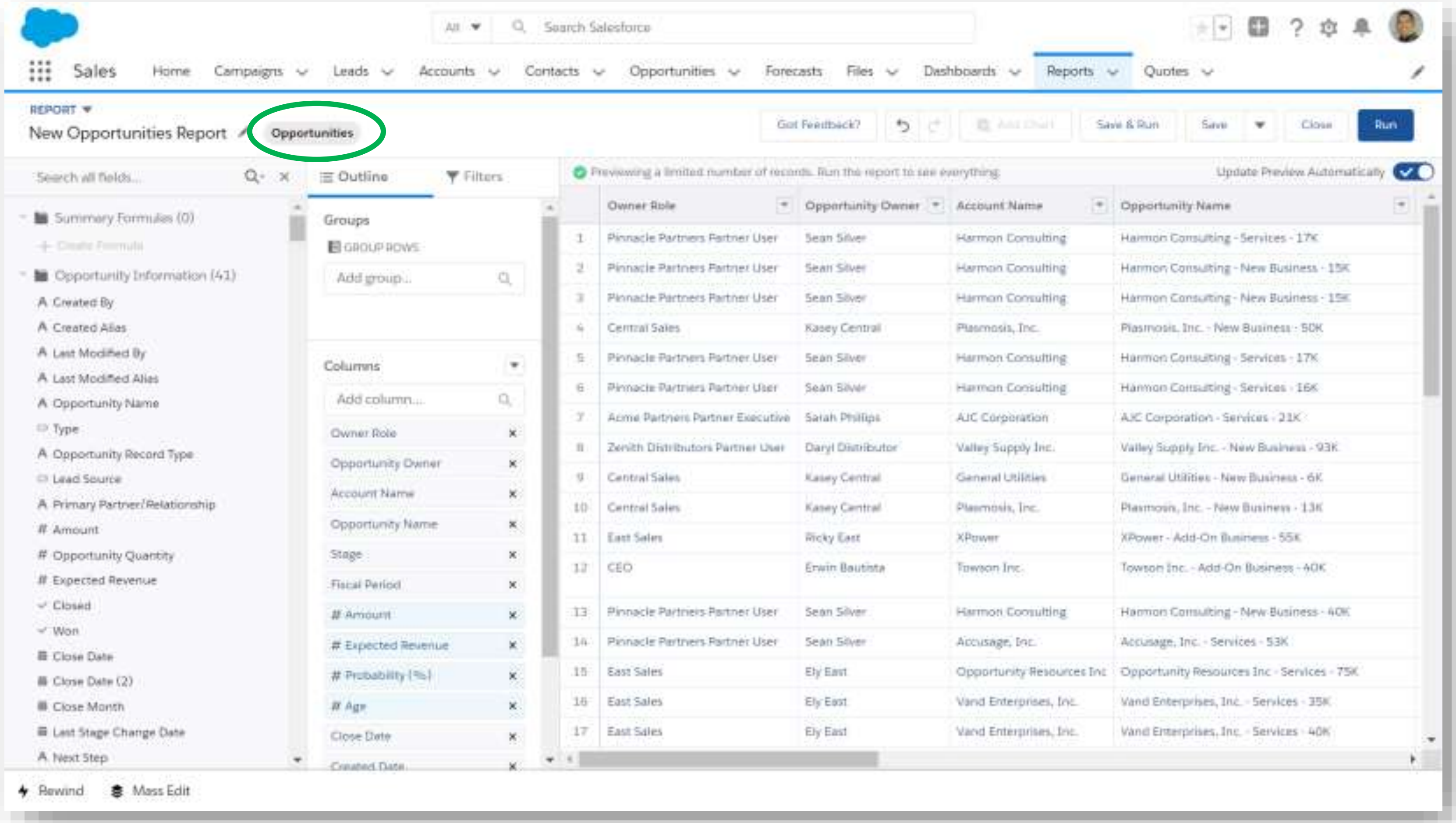
3. Layout

Report Type

- The Report Type determines the fields made available in Lightning Report Builder.
- It also determines the data columns that show by default on the Report Preview Pane
- When Standard Report Types are not enough, Custom Report Types can be created.

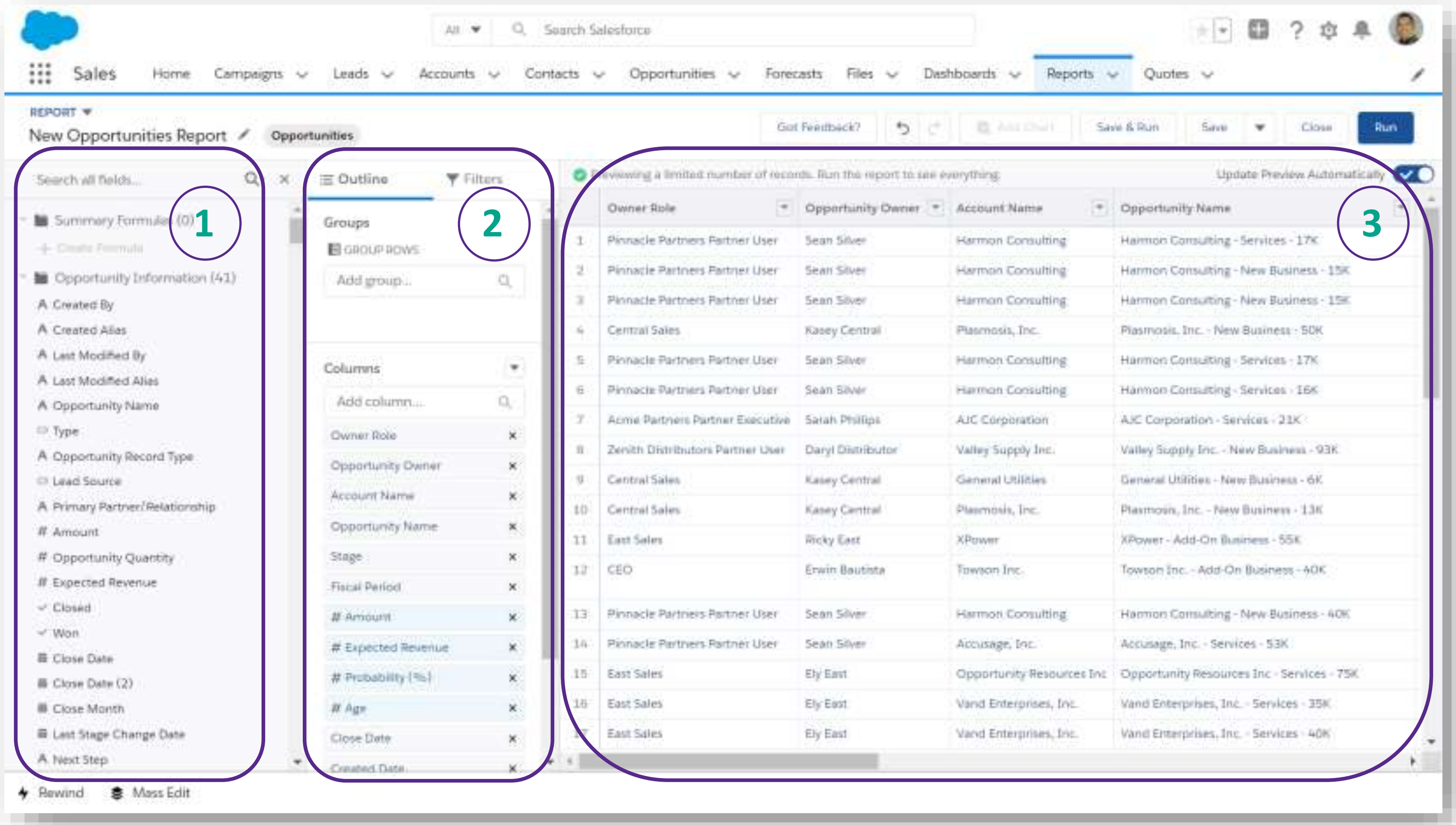


Report Type



Digitize. Disrupt. **Lead.**

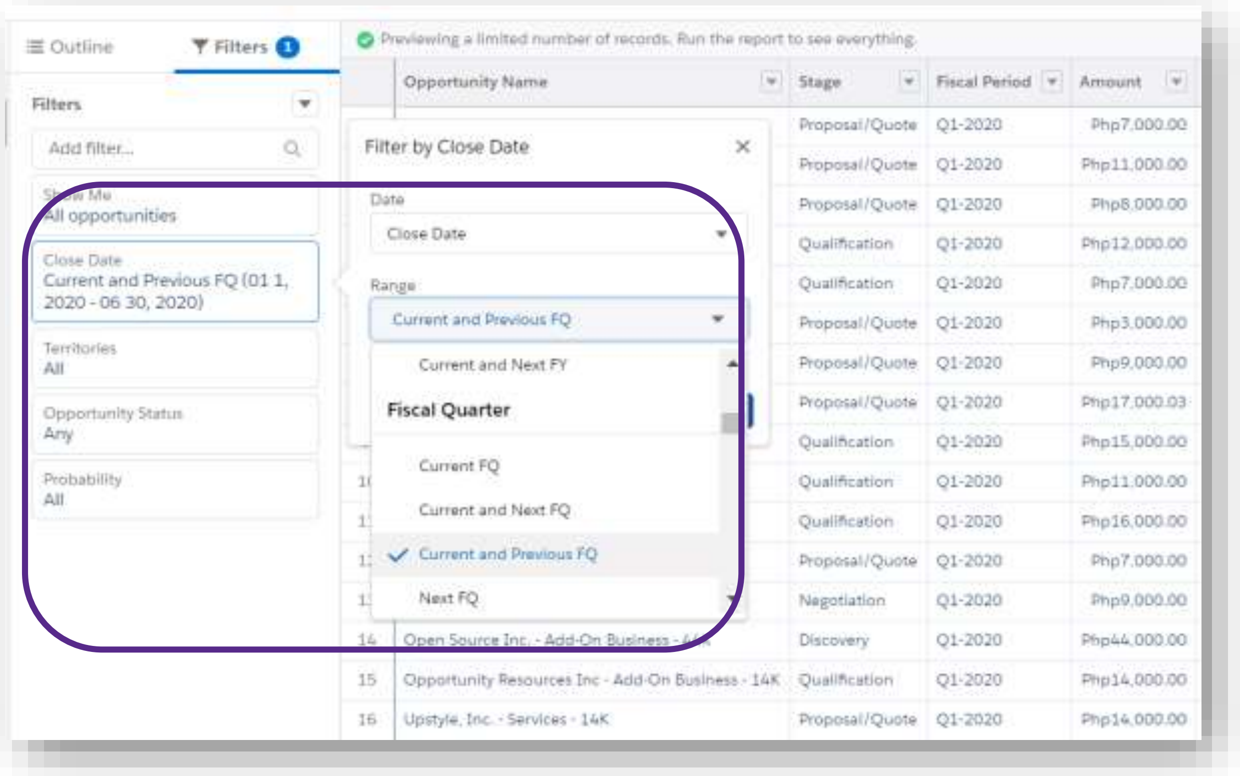
Report Type



Sales
Home
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Files
Dashboards
Reports
Quotes
REPORT
New Opportunities Report
Opportunities
Save & Run
Save
Close
Run
1
2
3
Outline
Filters
Groups
GROUP ROWS
Columns
Owner Role
Opportunity Owner
Account Name
Opportunity Name
Stage
Fiscal Period
Amount
Expected Revenue
Age
Close Date
Rewind
Mass Edit

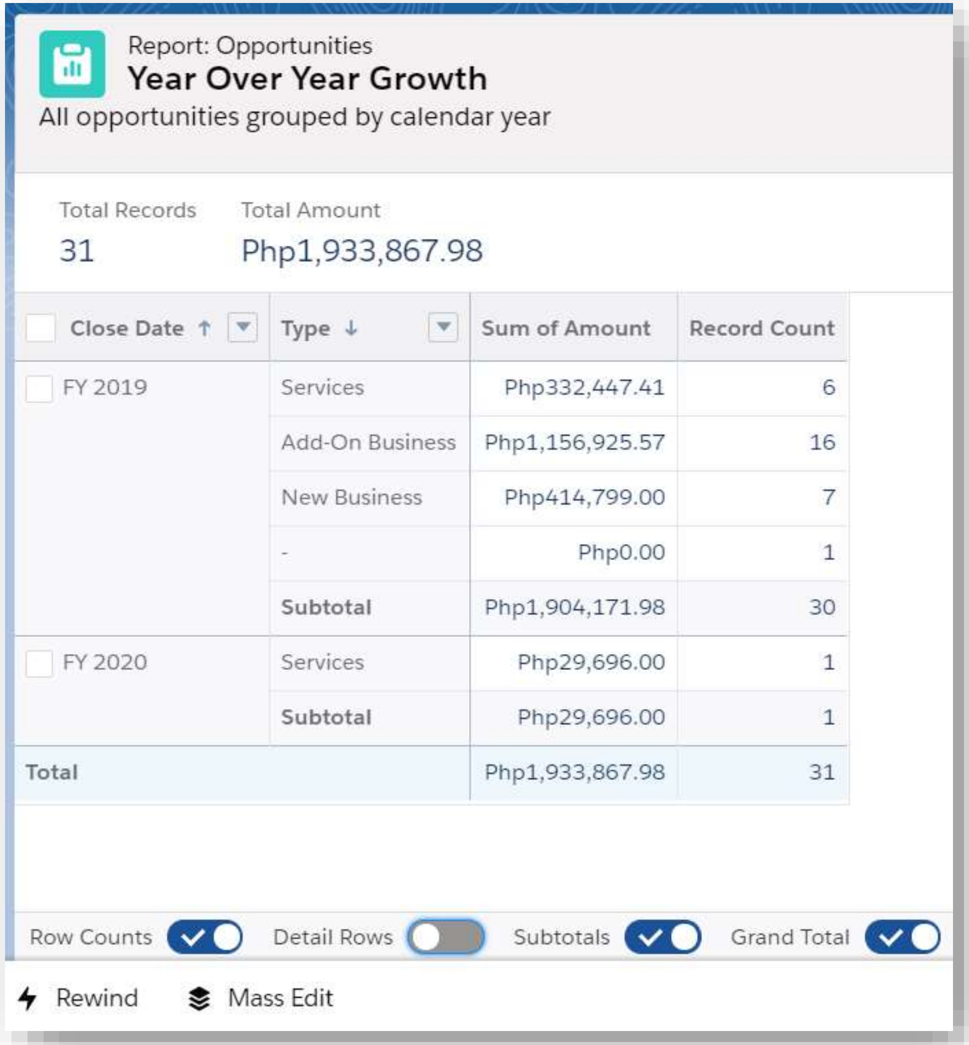
Filter Criteria

- Use filters to limit your data to what your target audience needs to see.
- Any field that is included in the report type selected can be used as a filter criteria.
- Filter logic can be utilized to combine several field conditions to create a complex filter criteria.



Layout

- How data is grouped impacts the overall readability of a report.


Report: Opportunities
Year Over Year Growth
All opportunities grouped by calendar year

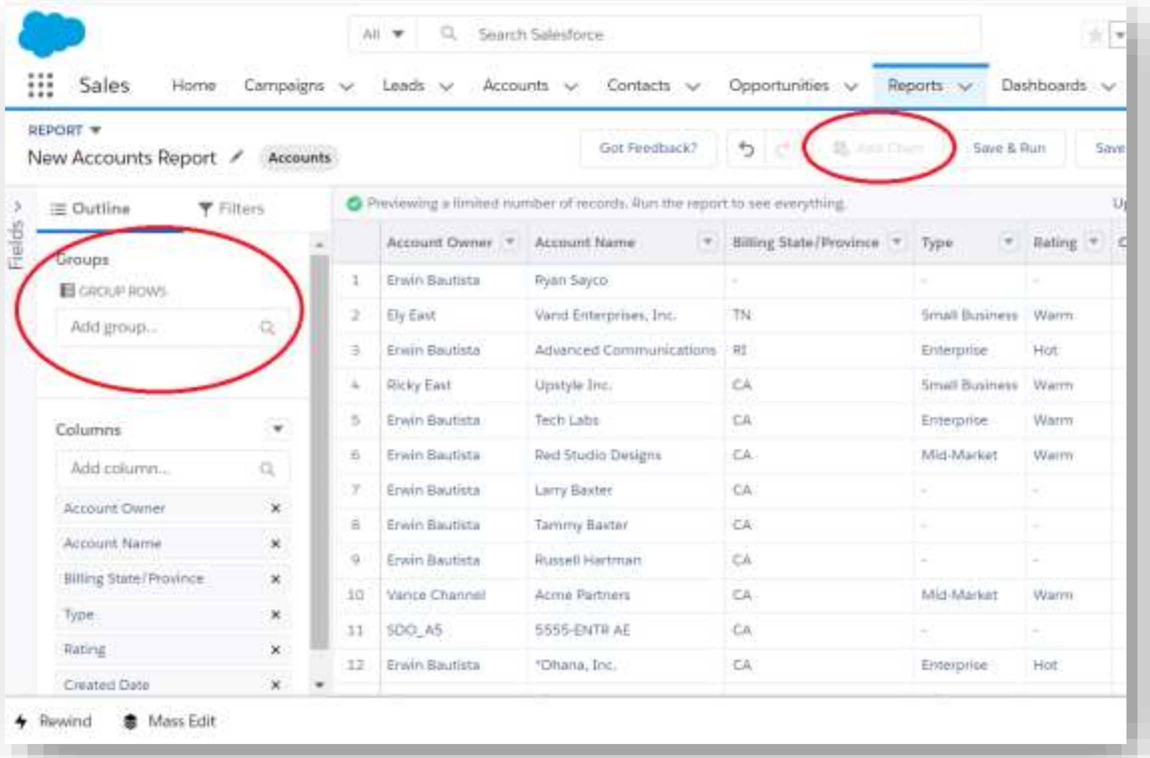
Total Records: 31
Total Amount: Php1,933,867.98

Close Date ↑	Type ↓	Sum of Amount	Record Count
FY 2019	Services	Php332,447.41	6
	Add-On Business	Php1,156,925.57	16
	New Business	Php414,799.00	7
	-	Php0.00	1
	Subtotal	Php1,904,171.98	30
FY 2020	Services	Php29,696.00	1
	Subtotal	Php29,696.00	1
Total		Php1,933,867.98	31

Row Counts Detail Rows Subtotals Grand Total
Rewind Mass Edit

Layout

- How data is grouped impacts the overall readability of a report.
- It also influences graphs that can be used.

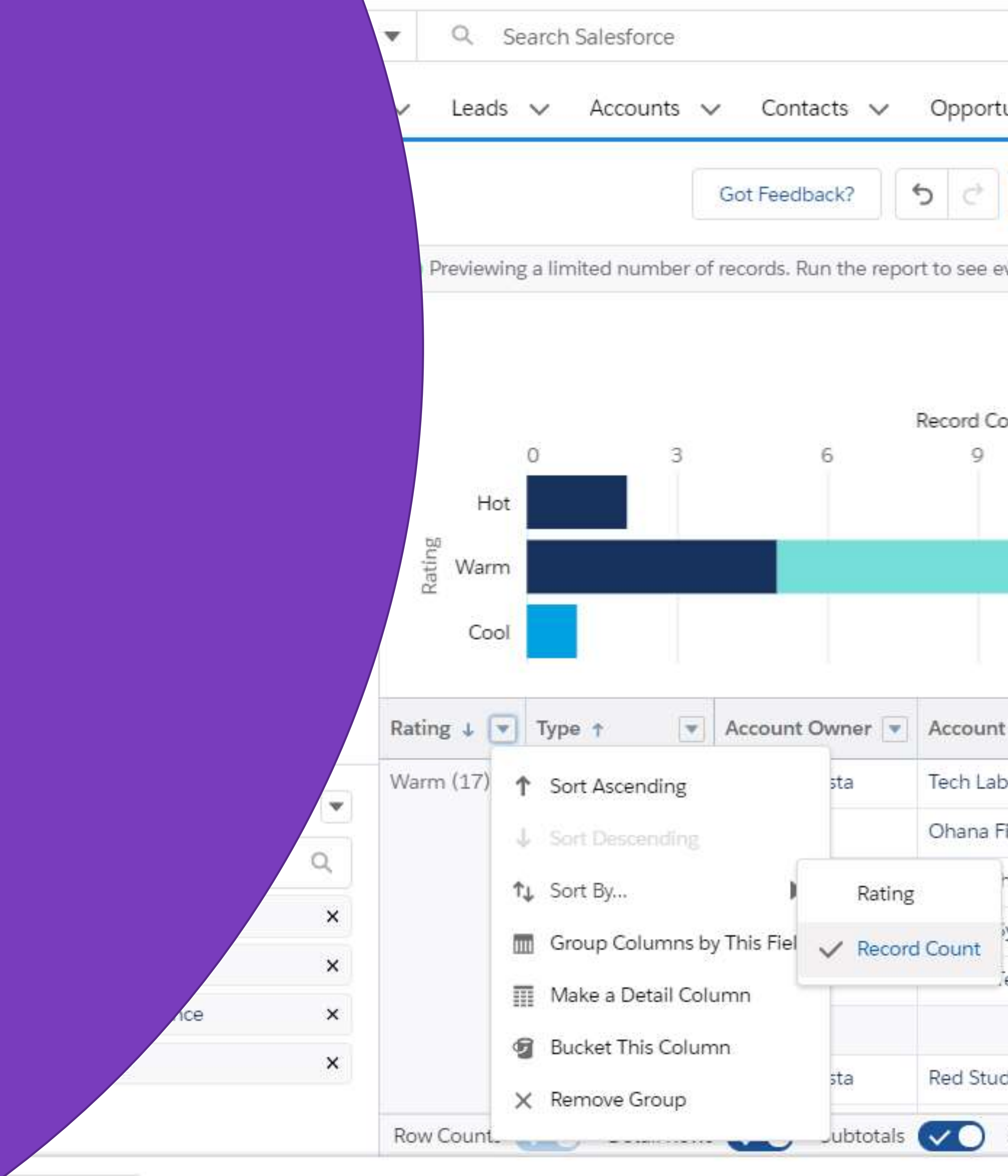


Layout

- How data is grouped impacts the overall readability of a report.
- It also influences graphs that can be used.
- The basic layouts available are Tabular, Summary, and Matrix.

Lightning Report Builder Demo

Creating your first few Salesforce Reports



Meet Bill Carter

1. Lead Report showing Touched and Untouched

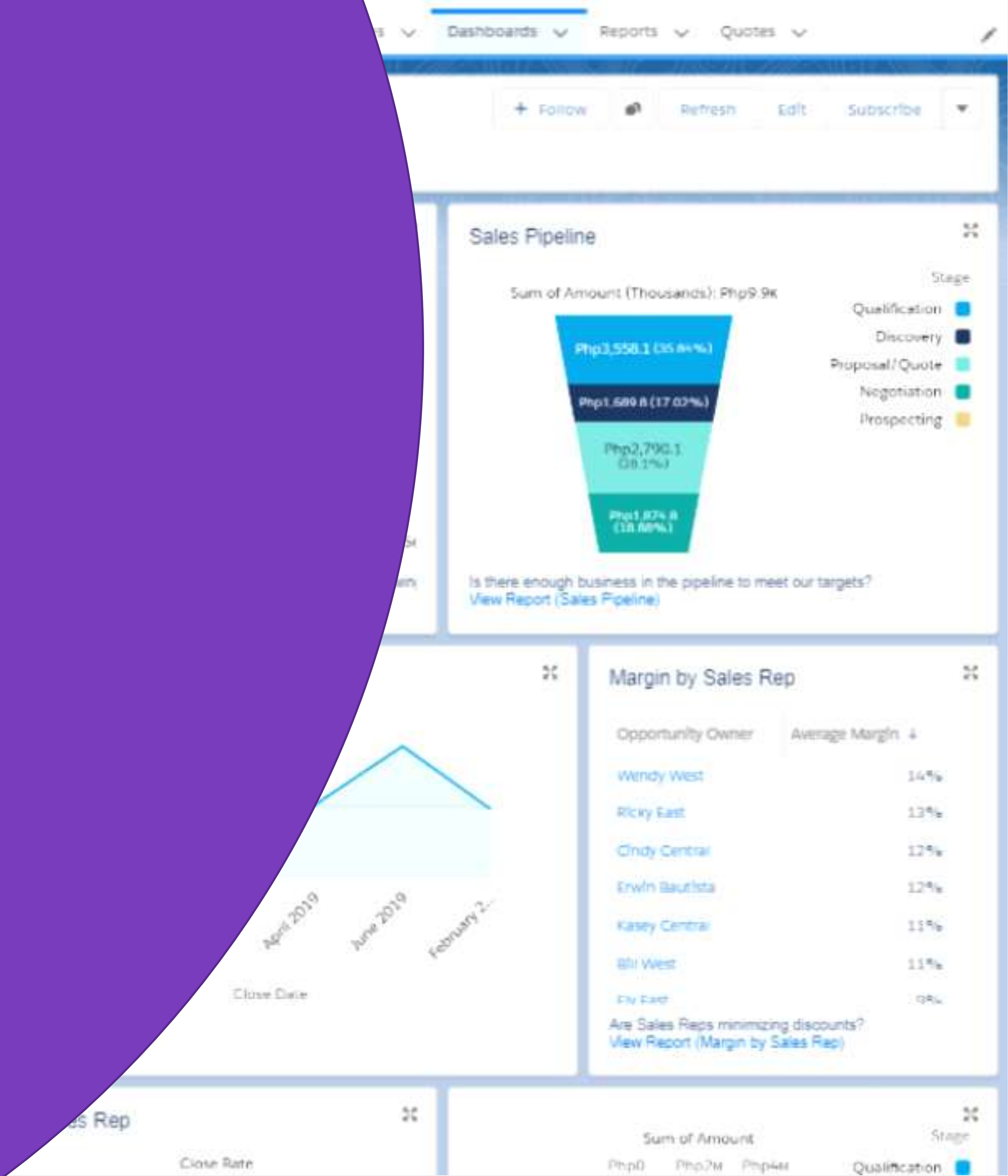
2. Sales Deals Stuck on Stages

3. 2018 vs 2019 Opportunities

SWITCH TO DEMO ORG

The Fundamentals of a Dashboard

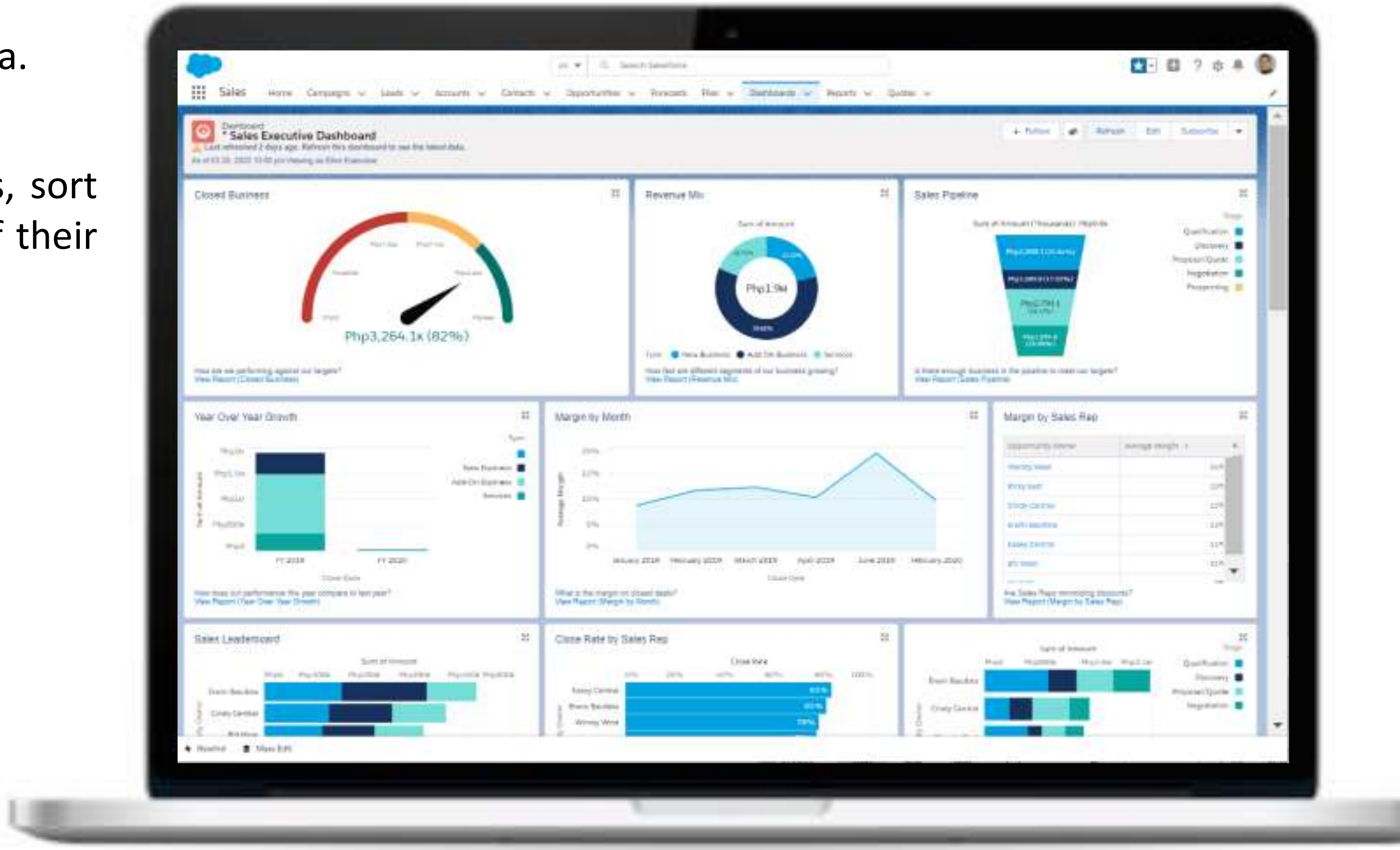
Adding reports, choosing components, storing, and sharing



Dashboards

Dashboards help you visualize business data.

Dashboards can help users identify trends, sort out quantities, and measure the impact of their activities among other things.



https://help.salesforce.com/articleView?id=rd_dashboards_overview.htm&type=5

Dashboards

As you prepare to curate your Salesforce data with dashboards, keep these tips in mind

- Reports provide all the data shown in a dashboard.

https://help.salesforce.com/articleView?id=rd_dashboards_overview.htm&type=5

Dashboards

As you prepare to curate your Salesforce data with dashboards, keep these tips in mind

- Reports provide all the data shown in a dashboard.
- When refreshing a dashboard, all the data-providing reports must run.

https://help.salesforce.com/articleView?id=rd_dashboards_overview.htm&type=5

Dashboards

As you prepare to curate your Salesforce data with dashboards, keep these tips in mind

- Reports provide all the data shown in a dashboard.
- When refreshing a dashboard, all the data-providing reports must run.
- Dashboards are shared via folders.

https://help.salesforce.com/articleView?id=rd_dashboards_overview.htm&type=5

Three Elements That Drive a Dashboard

1. **Source Report**
   - The report the is being visualized in a dashboard component.

2. **Components**
   - These are the visual blocks of a dashboard.

3. **Running User (Viewing As)**

https://help.salesforce.com/articleView?id=dashboards_create_lex.htm&type=5

Three Elements That Drive a Dashboard

1. **Source Report**
   - ➢ The report the is being visualized in a dashboard component.

2. **Components**
   - ➢ These are the visual blocks of a dashboard.

3. **Running User (Viewing As)**
   - ➢ Determines the amount of data a user can view

https://help.salesforce.com/articleView?id=dashboards_create_lex.htm&type=5

Dashboard Build Demo

Putting your Sales Reports together

SWITCH TO DEMO ORG

Questions?

Beyond the Basics

Your business data and **YOU**

Photo credits


Beyond the Basics

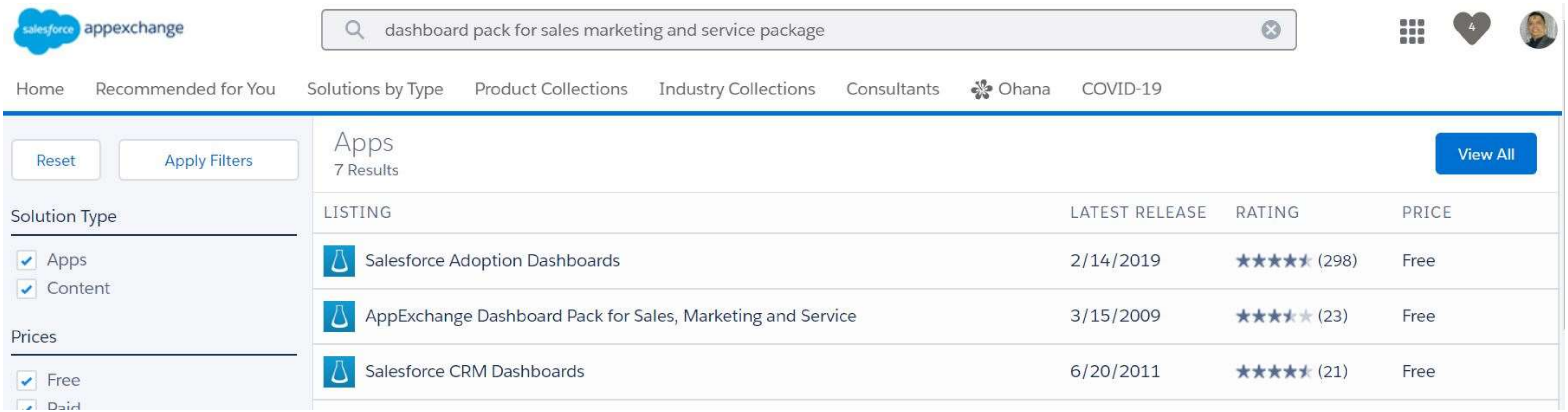
4 Simple Steps to Leveling Up Your Reports & Dashboard Skills

1. Know what users’ business pain points.

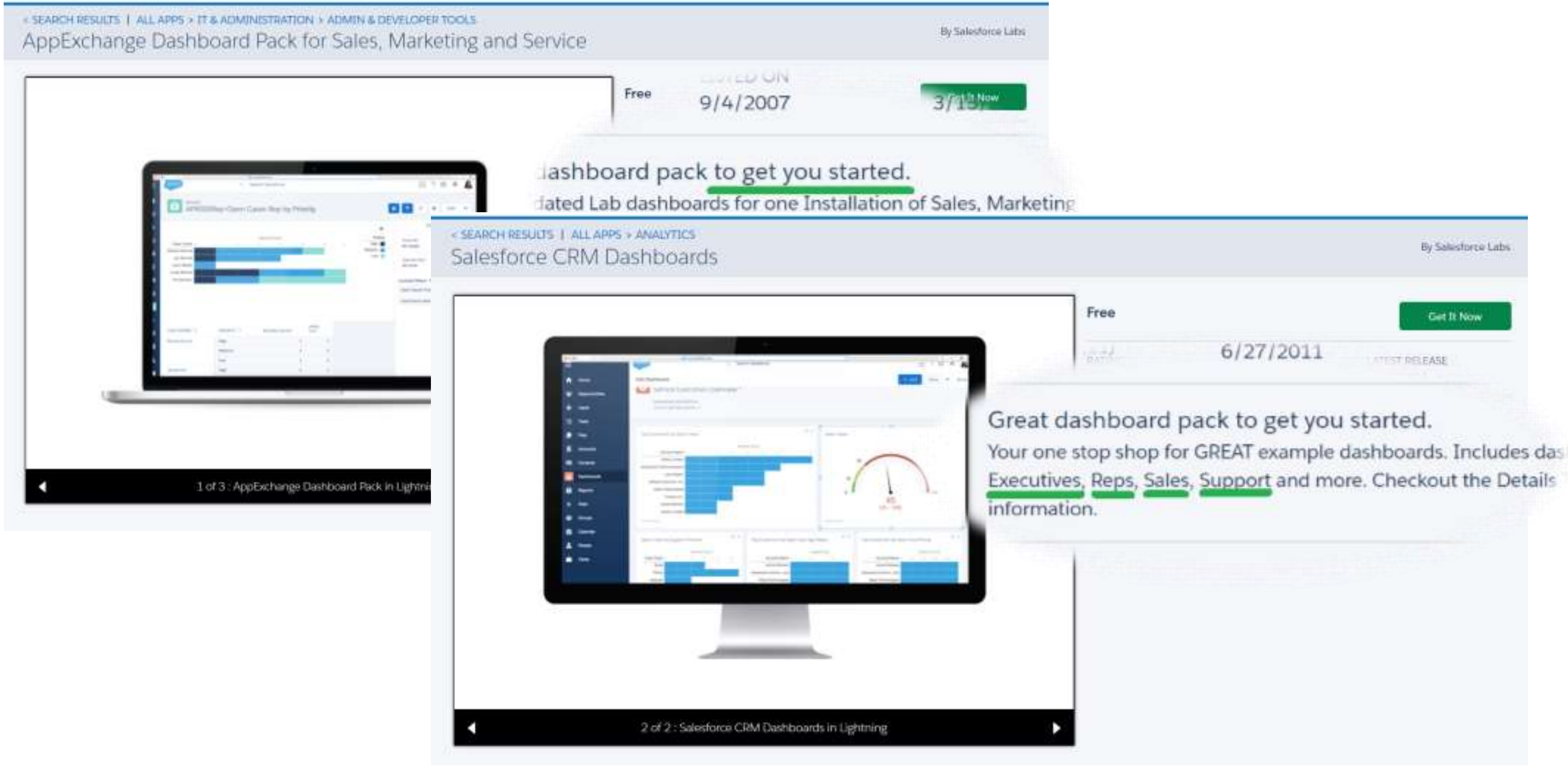
2. Capture the right data

3. Build with a specific audience in mind.

Beyond the Basics



Beyond the Basics



Beyond the Basics

4 Simple Steps to Leveling Up Your Reports & Dashboard Skills

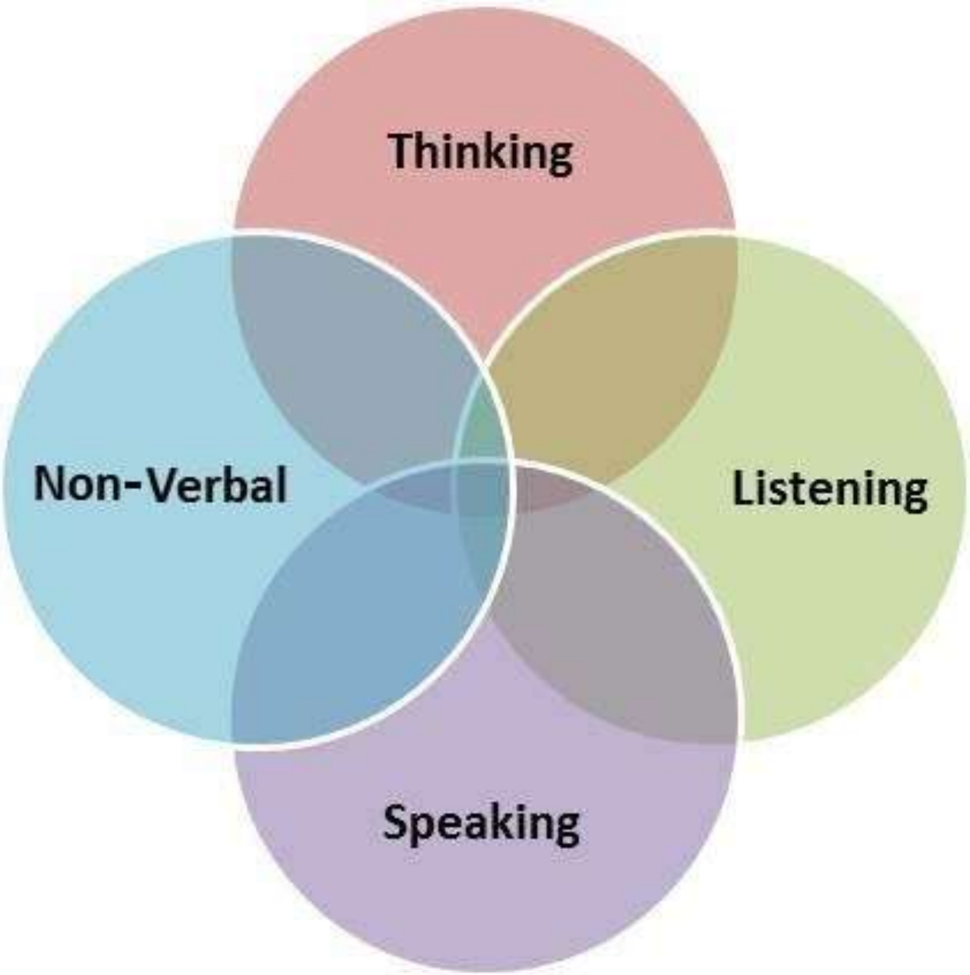
1. Know what users' business pain points.

2. Capture the right data

3. Build with a specific audience in mind.

4. Get feedback.

Communication Skills



- When learning about business pain points, you are **listening.**
- When designing your UX, you are **thinking.**
- When presenting your data visualization, you are communicating **non-verbally.**
- When asking for feedback, you are **speaking** with the intention to also listen.

Contact Me

erwin.bautista@lingarogroup.com

Check out our site

www.lingarogroup.com


Thank You !!
Trailblazer