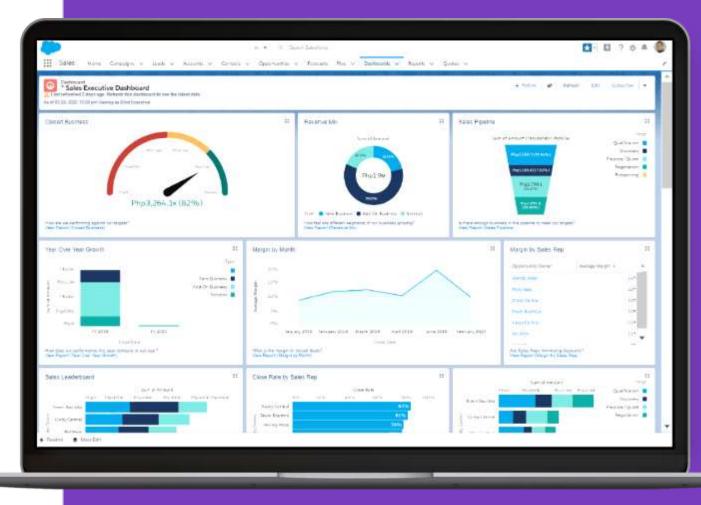
lingaro salesforce

Salesforce Reports & Dashboards Fast Track

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





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...?

Our Goals

- What knowledge this session aims to impart

The Fundamentals of a Dashboard

- Adding report, choosing components, storing and sharing

The Fundamentals of a Report

- Basic elements that drive a Salesforce Reports

Dashboard Build Demo

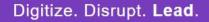
- Putting your Sales Reports together

Lightning Report Builder Demo

- Creating your first few Sales Reports

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 ...

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- 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 ...

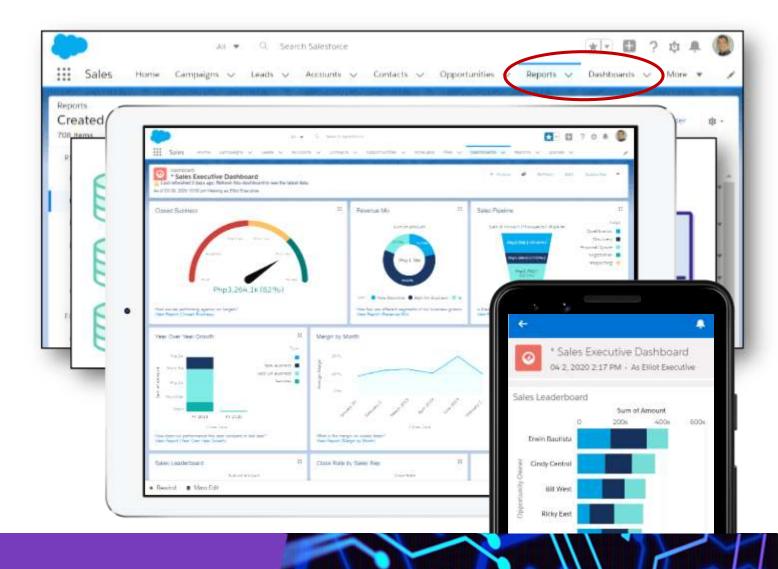
- get (re)acquainted with the basic elements of Salesforce Reports and Dashboard
- learn how you can have real-time visibility of your business data in Salesforce
- skill up for furthering your career in the Salesforce Ecosystem



Why?

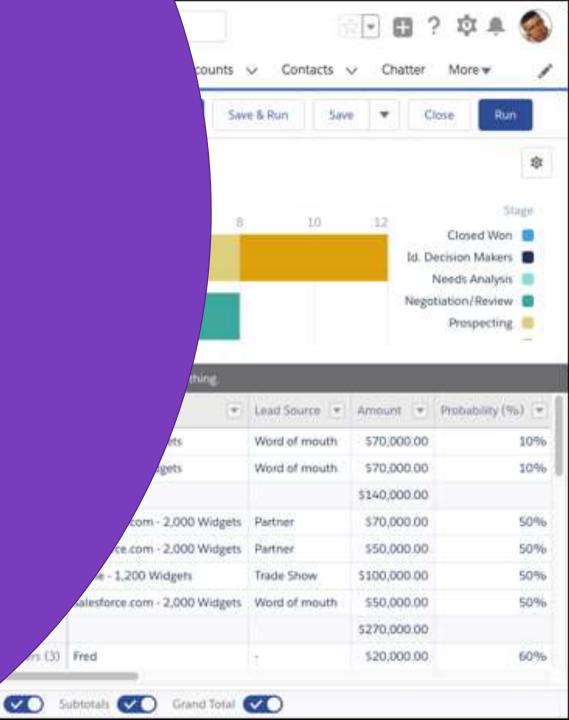
3 Reasons to Start Utilizing Salesforce Reports and Dashboards

- 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



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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?

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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.

IL	Search Report Types
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Report Type

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Report Type

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Filter Criteria

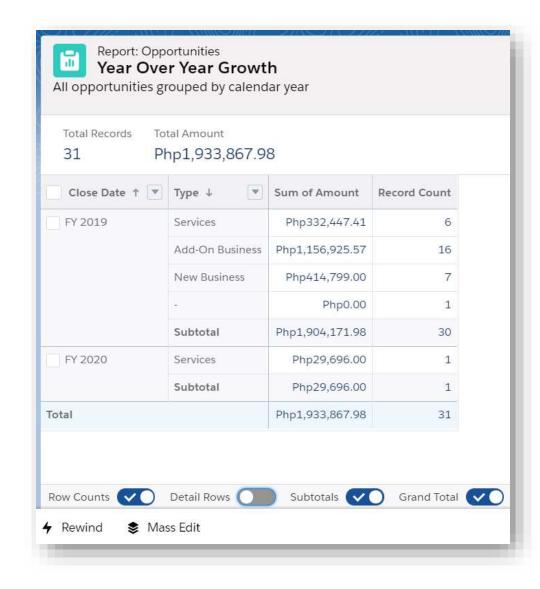
- Use filters to limit your data to what your target audience needs to see.
- Any field that is included in the report type selected can be used as a filter criteria.
- Filter logic can be utilized to combine several field conditions to create a complex filter criteria.

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		16	Upstyle, Inc Services - 14K		Proposal/Quote	Q1-2020	Php14.000.00



Layout

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



Layout

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

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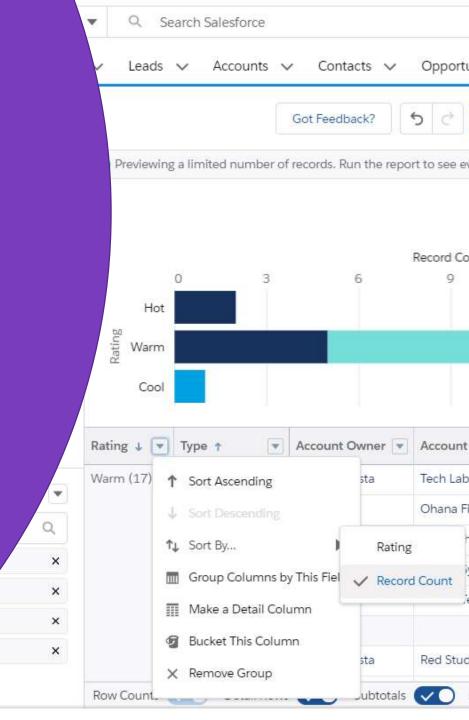
Layout

- 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.







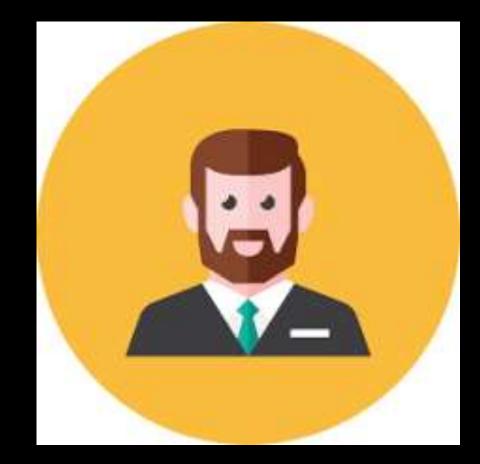


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Lightning Report Builder Demo

Creating your first few Salesforce Reports

Meet Bill Carter







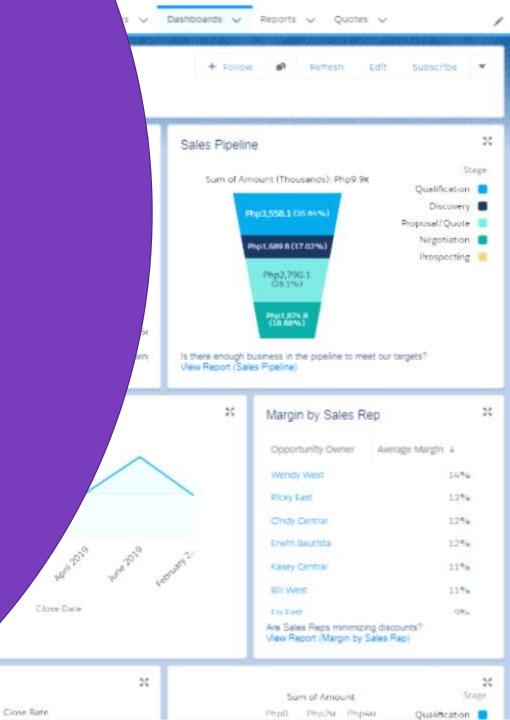
- 1. Lead Report showing Touched and Untouched
- 2. Sales Deals Stuck on Stages
- 3. 2018 vs 2019 Opportunities

SWITCH TO DEMO ORG



Digitize. Disrupt. Lead.





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The Fundamentals of a Dashboard

Adding reports, choosing components, storing, and sharing

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.

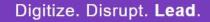


https://help.salesforce.com/articleView?id=rd_dashboards_overview.htm&type=5



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

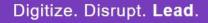
• Reports provide all the data shown in a dashboard.





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

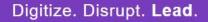
- Reports provide all the data shown in a dashboard.
- When refreshing a dashboard, all the data-providing reports must run.





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.



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)







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



Dashboard Build Demo

Putting your Sales Reports together



SWITCH TO DEMO ORG



Questions?



Your business data and YOU







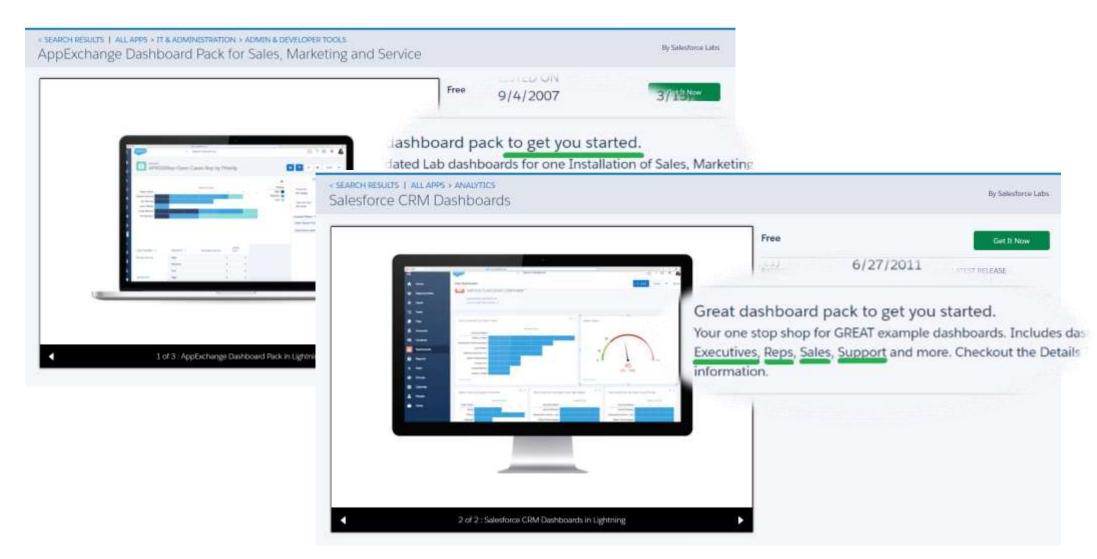
4 Simple Steps to Leveling Up Your Reports & Dashboard Skills

- 1. Know what users' business pain points.
- 2. Capture the right data
- 3. Build with a specific audience in mind.



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Home Recommended for You	Solutions by Type Product Collections Industry Collections Consultants 💑 Ohana	COVID-19				
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AppsContent	Salesforce Adoption Dashboards	2/14/2019	★★★★★ (298)	Free		
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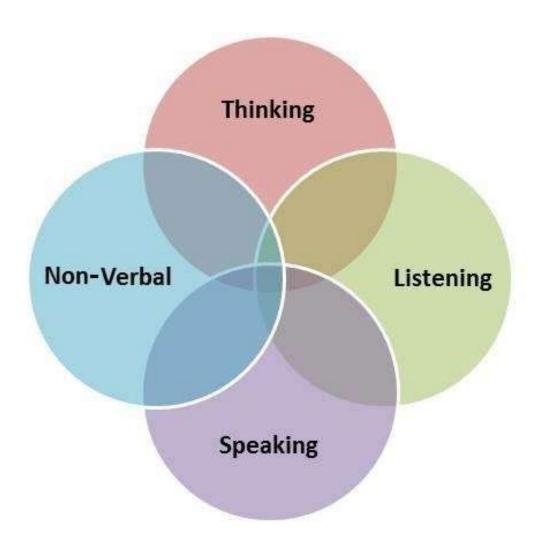
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- 1. Know what users' business pain points.
- 2. Capture the right data
- 3. Build with a specific audience in mind.
- 4. Get feedback.





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.

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