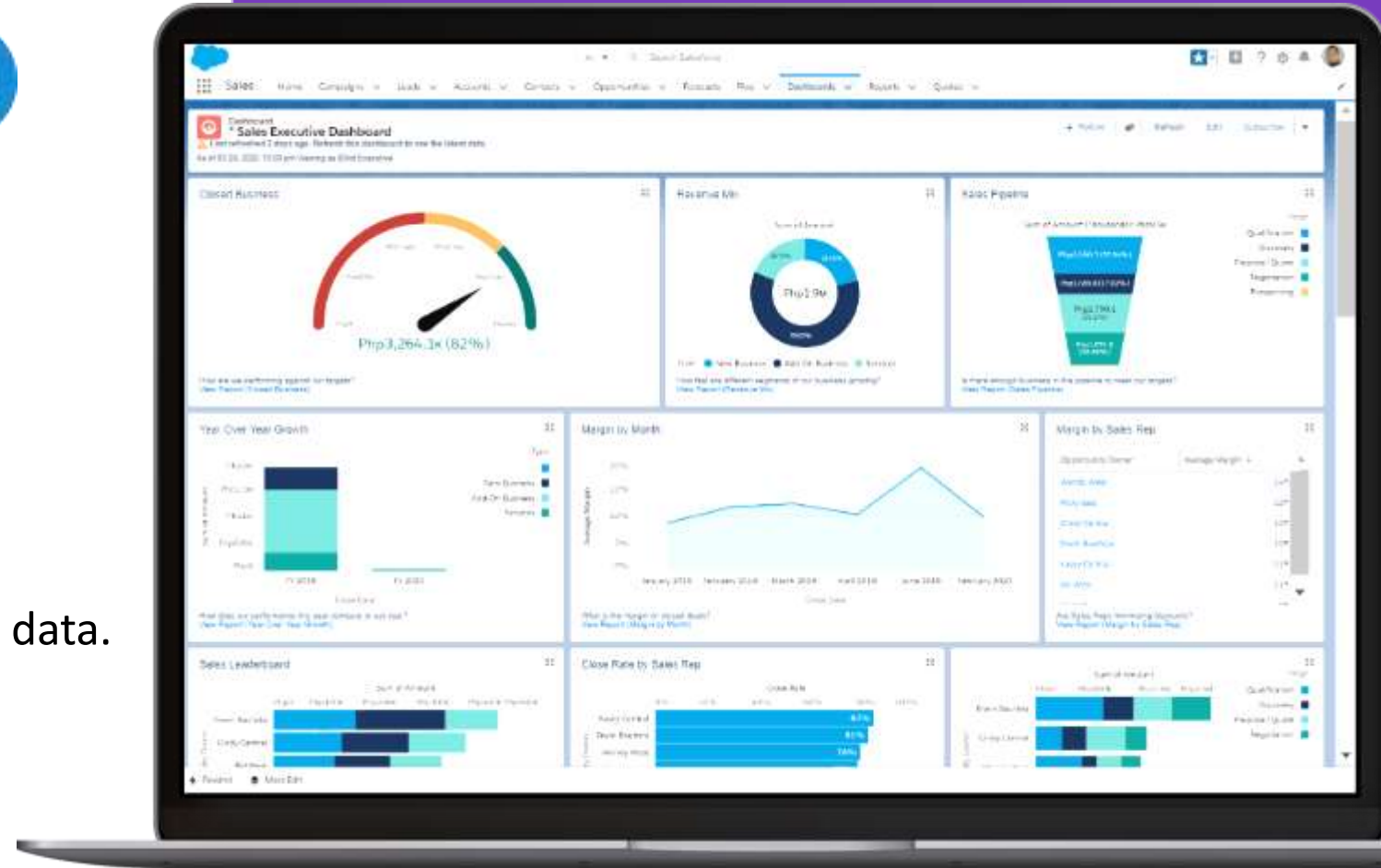




Salesforce Reports & Dashboards Fast Track

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

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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

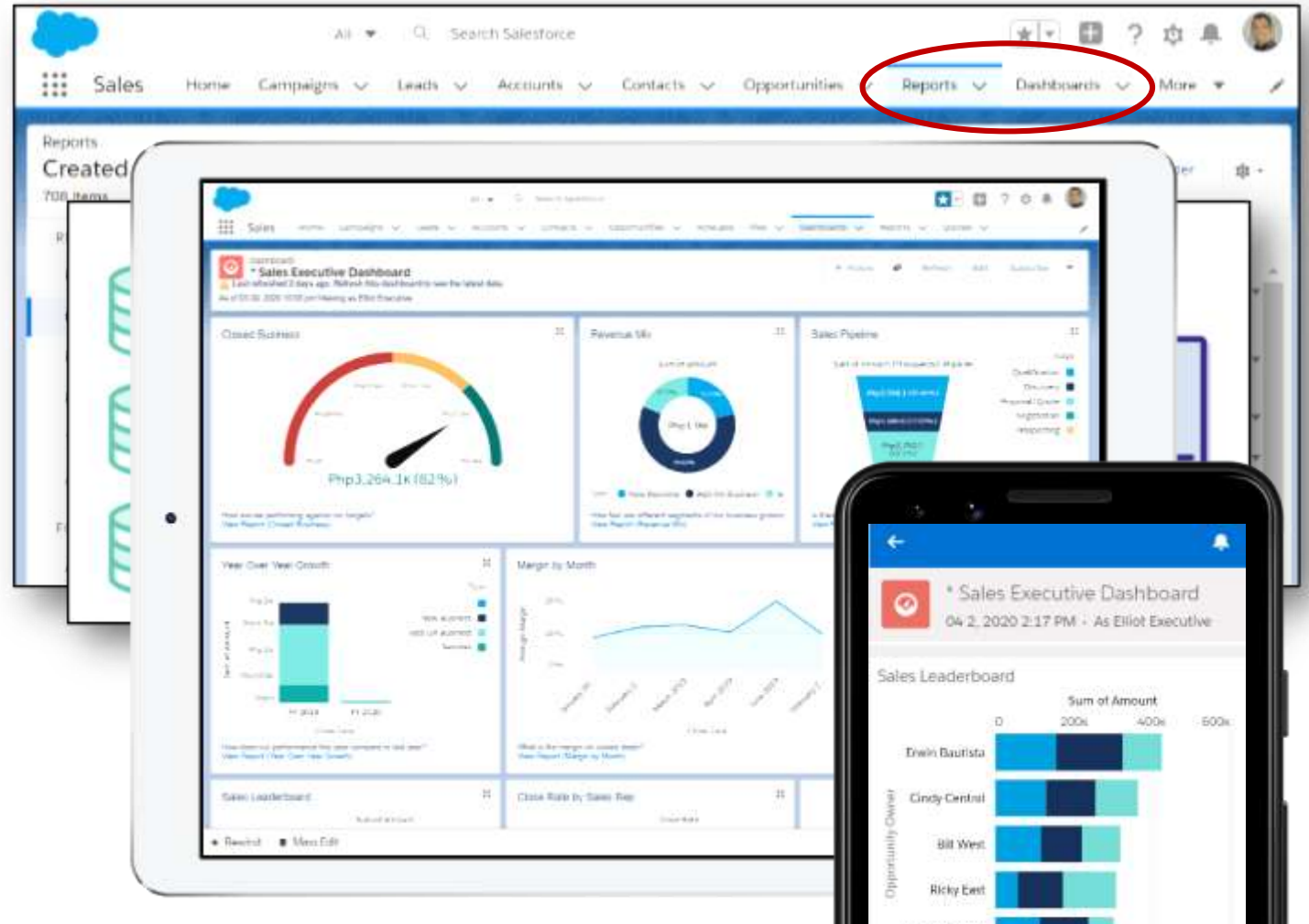


Why?

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

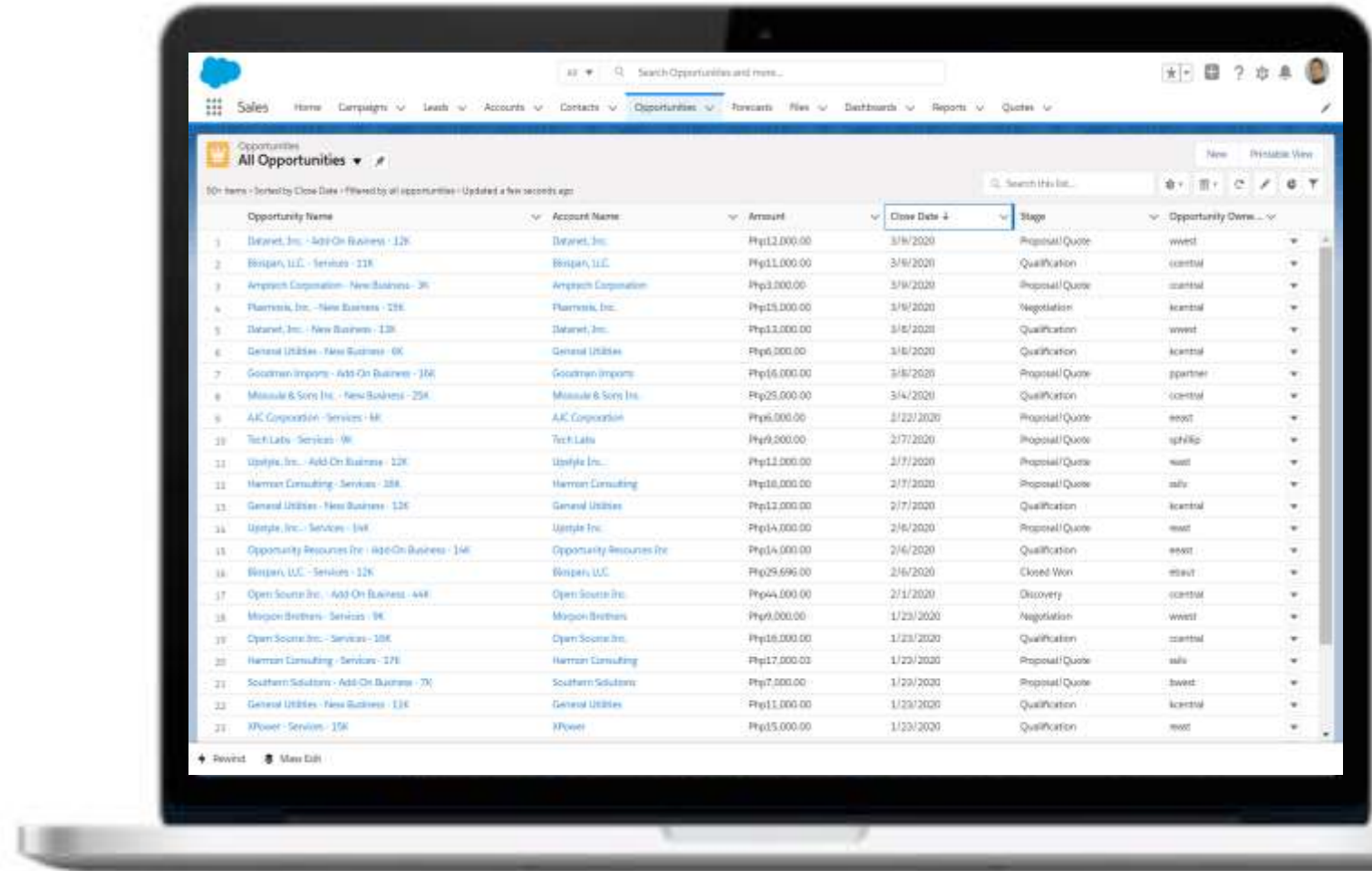
The screenshot displays a Salesforce report interface. At the top, there are navigation tabs for 'Accounts', 'Contacts', 'Chatter', and 'More'. Below these are buttons for 'Save & Run', 'Save', 'Close', and 'Run'. A bar chart is visible, with a legend on the right titled 'Stage'. The legend includes: 'Closed Won' (blue), 'Id. Decision Makers' (dark blue), 'Needs Analysis' (light blue), 'Negotiation/Review' (teal), and 'Prospecting' (yellow). The bar chart shows a single bar with segments in yellow, teal, and dark blue, with values 8, 10, and 12 indicated above the segments. Below the chart is a table with columns for 'Lead Source', 'Amount', and 'Probability (%)'. The table contains several rows of data, including 'Word of mouth' and 'Partner' lead sources. At the bottom, there are toggle switches for 'Show', 'Subtotals', and 'Grand Total', all of which are currently turned on.

Lead Source	Amount	Probability (%)
Word of mouth	\$70,000.00	10%
Word of mouth	\$70,000.00	10%
	\$140,000.00	
Partner	\$70,000.00	50%
Partner	\$50,000.00	50%
Trade Show	\$100,000.00	50%
Word of mouth	\$50,000.00	50%
	\$270,000.00	
	\$20,000.00	60%

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

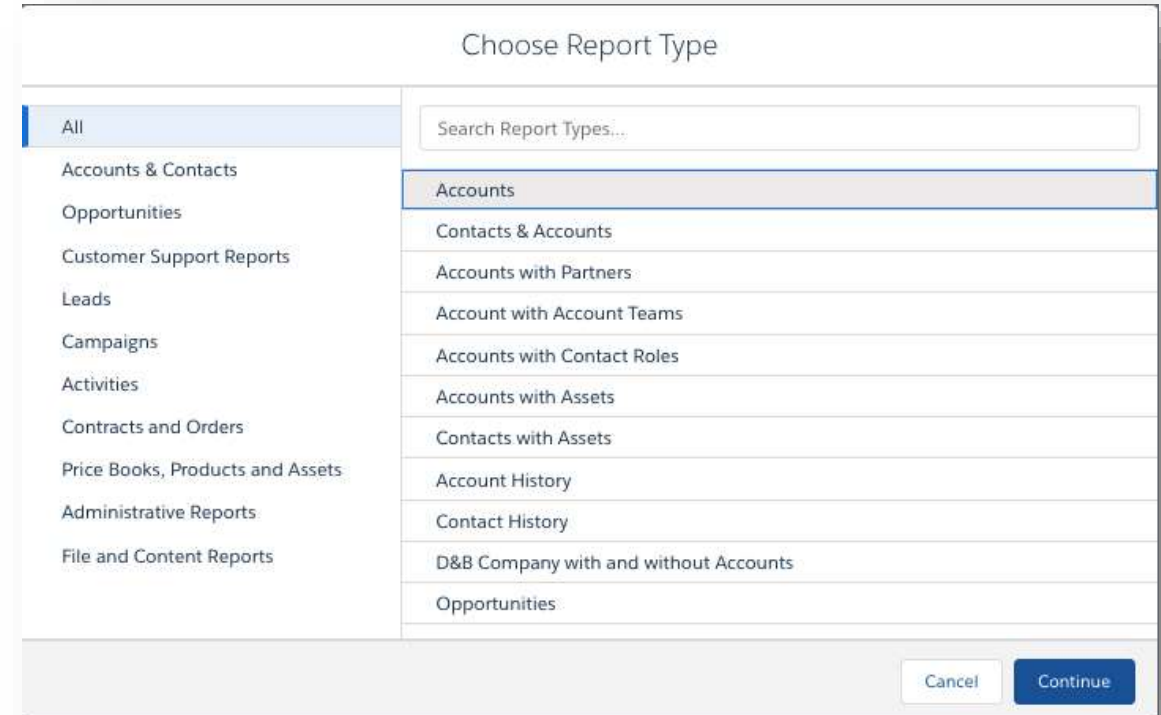
1. Report Type
2. Filter Criteria
3. Layout



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



The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with 'Sales' and various object tabs like 'Home', 'Campaigns', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Files', 'Dashboards', 'Reports', and 'Quotes'. The 'Reports' tab is active, and a dropdown menu shows 'Opportunities' selected and circled in green. Below this, the report title is 'New Opportunities Report'. The main area is divided into three sections: a left sidebar for field selection, a middle 'Columns' panel, and a right table preview.

Field Selection Sidebar:

- Summary Formulas (0)
- Opportunity Information (41)
- Created By
- Created Alias
- Last Modified By
- Last Modified Alias
- Opportunity Name
- Type
- Opportunity Record Type
- Lead Source
- Primary Partner/Relationship
- Amount
- Opportunity Quantity
- Expected Revenue
- Closed
- Won
- Close Date
- Close Date (2)
- Close Month
- Last Stage Change Date
- Next Step

Columns Panel:

- Owner Role
- Opportunity Owner
- Account Name
- Opportunity Name
- Stage
- Fiscal Period
- Amount
- Expected Revenue
- Probability (%)
- Age
- Close Date
- Created Date

Table Preview:

	Owner Role	Opportunity Owner	Account Name	Opportunity Name
1	Pinnacle Partners Partner User	Sean Silver	Harmon Consulting	Harmon Consulting - Services - 17K
2	Pinnacle Partners Partner User	Sean Silver	Harmon Consulting	Harmon Consulting - New Business - 15K
3	Pinnacle Partners Partner User	Sean Silver	Harmon Consulting	Harmon Consulting - New Business - 15K
4	Central Sales	Kasey Central	Plasmosis, Inc.	Plasmosis, Inc. - New Business - 50K
5	Pinnacle Partners Partner User	Sean Silver	Harmon Consulting	Harmon Consulting - Services - 17K
6	Pinnacle Partners Partner User	Sean Silver	Harmon Consulting	Harmon Consulting - Services - 16K
7	Acme Partners Partner Executive	Sarah Phillips	AJC Corporation	AJC Corporation - Services - 21K
8	Zenith Distributors Partner User	Daryl Distributor	Valley Supply Inc.	Valley Supply Inc. - New Business - 93K
9	Central Sales	Kasey Central	General Utilities	General Utilities - New Business - 6K
10	Central Sales	Kasey Central	Plasmosis, Inc.	Plasmosis, Inc. - New Business - 13K
11	East Sales	Ricky East	XPower	XPower - Add-On Business - 55K
12	CEO	Erwin Bautista	Towson Inc.	Towson Inc. - Add-On Business - 40K
13	Pinnacle Partners Partner User	Sean Silver	Harmon Consulting	Harmon Consulting - New Business - 40K
14	Pinnacle Partners Partner User	Sean Silver	Accusage, Inc.	Accusage, Inc. - Services - 53K
15	East Sales	Ely East	Opportunity Resources Inc	Opportunity Resources Inc - Services - 75K
16	East Sales	Ely East	Vand Enterprises, Inc.	Vand Enterprises, Inc. - Services - 35K
17	East Sales	Ely East	Vand Enterprises, Inc.	Vand Enterprises, Inc. - Services - 40K



Report Type



The screenshot displays the Salesforce Reports interface for a 'New Opportunities Report'. The interface is divided into three main sections, each highlighted with a purple circle and a number:

- 1**: The left sidebar, titled 'Search all fields...', contains a list of fields for selection, including 'Summary Formulas (0)', 'Opportunity Information (41)', and various fields like 'Created By', 'Opportunity Name', and 'Amount'.
- 2**: The middle sidebar, titled 'Outline', shows the report's structure with 'Groups' and 'Columns'. The 'Columns' section lists selected fields such as 'Owner Role', 'Opportunity Owner', 'Account Name', 'Opportunity Name', 'Stage', 'Fiscal Period', '# Amount', '# Expected Revenue', '# Probability (%)', '# Age', 'Close Date', and 'Created Date'.
- 3**: The main table area, showing a preview of report records. The table has columns for 'Owner Role', 'Opportunity Owner', 'Account Name', and 'Opportunity Name'. The first few rows of data are visible, showing details for various sales opportunities.





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.

The screenshot shows a CRM report interface with a 'Filters' panel on the left and a data table on the right. The 'Filters' panel includes a search bar and several filter categories: 'Close Date' (Current and Previous FQ (01 1, 2020 - 06 30, 2020)), 'Territories' (All), 'Opportunity Status' (Any), and 'Probability' (All). A 'Filter by Close Date' dialog box is open, showing a dropdown menu for 'Close Date' with the 'Range' set to 'Current and Previous FQ'. The 'Fiscal Quarter' dropdown is also visible, with 'Current and Previous FQ' selected. The data table on the right displays columns for 'Opportunity Name', 'Stage', 'Fiscal Period', and 'Amount', with rows of opportunity data.

Opportunity Name	Stage	Fiscal Period	Amount
	Proposal/Quote	Q1-2020	Php7,000.00
	Proposal/Quote	Q1-2020	Php11,000.00
	Proposal/Quote	Q1-2020	Php8,000.00
	Qualification	Q1-2020	Php12,000.00
	Qualification	Q1-2020	Php7,000.00
	Proposal/Quote	Q1-2020	Php3,000.00
	Proposal/Quote	Q1-2020	Php9,000.00
	Proposal/Quote	Q1-2020	Php17,000.00
	Qualification	Q1-2020	Php15,000.00
	Qualification	Q1-2020	Php11,000.00
	Qualification	Q1-2020	Php16,000.00
	Proposal/Quote	Q1-2020	Php7,000.00
	Negotiation	Q1-2020	Php9,000.00
14 Open Source Inc. - Add-On Business - 4K	Discovery	Q1-2020	Php44,000.00
15 Opportunity Resources Inc - Add-On Business - 14K	Qualification	Q1-2020	Php14,000.00
16 Upstyle, Inc. - Services - 14K	Proposal/Quote	Q1-2020	Php14,000.00

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

<input type="checkbox"/> Close Date ↑ ▾	Type ↓ ▾	Sum of Amount	Record Count
<input type="checkbox"/> 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
<input type="checkbox"/> 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.

REPORT ▾
New Accounts Report Accounts

Got Feedback? ↻ Add Columns Save & Run Save

Previewing a limited number of records. Run the report to see everything.

	Account Owner	Account Name	Billing State/Province	Type	Rating
1	Erwin Bautista	Ryan Sayco	-	-	-
2	Ely East	Vand Enterprises, Inc.	TN	Small Business	Warm
3	Erwin Bautista	Advanced Communications	RJ	Enterprise	Hot
4	Ricky East	Upstyle Inc.	CA	Small Business	Warm
5	Erwin Bautista	Tech Labs	CA	Enterprise	Warm
6	Erwin Bautista	Red Studio Designs	CA	Mid-Market	Warm
7	Erwin Bautista	Larry Baxter	CA	-	-
8	Erwin Bautista	Tammy Baxter	CA	-	-
9	Erwin Bautista	Russell Hartman	CA	-	-
10	Vance Channel	Acme Partners	CA	Mid-Market	Warm
11	SDO_A5	5555-ENTR AE	CA	-	-
12	Erwin Bautista	*Dhana, Inc.	CA	Enterprise	Hot

Fields ▾ Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Account Owner x

Account Name x

Billing State/Province x

Type x

Rating x

Created Date x

⏮️ Rewind ⚙️ Mass Edit





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.



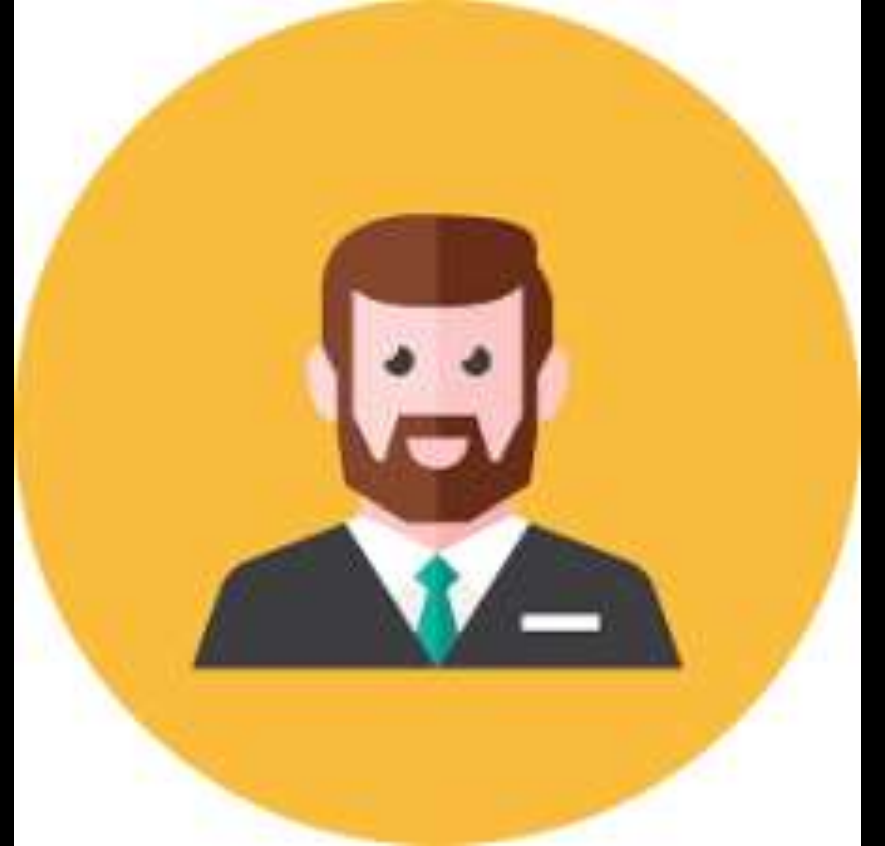


Lightning Report Builder Demo

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



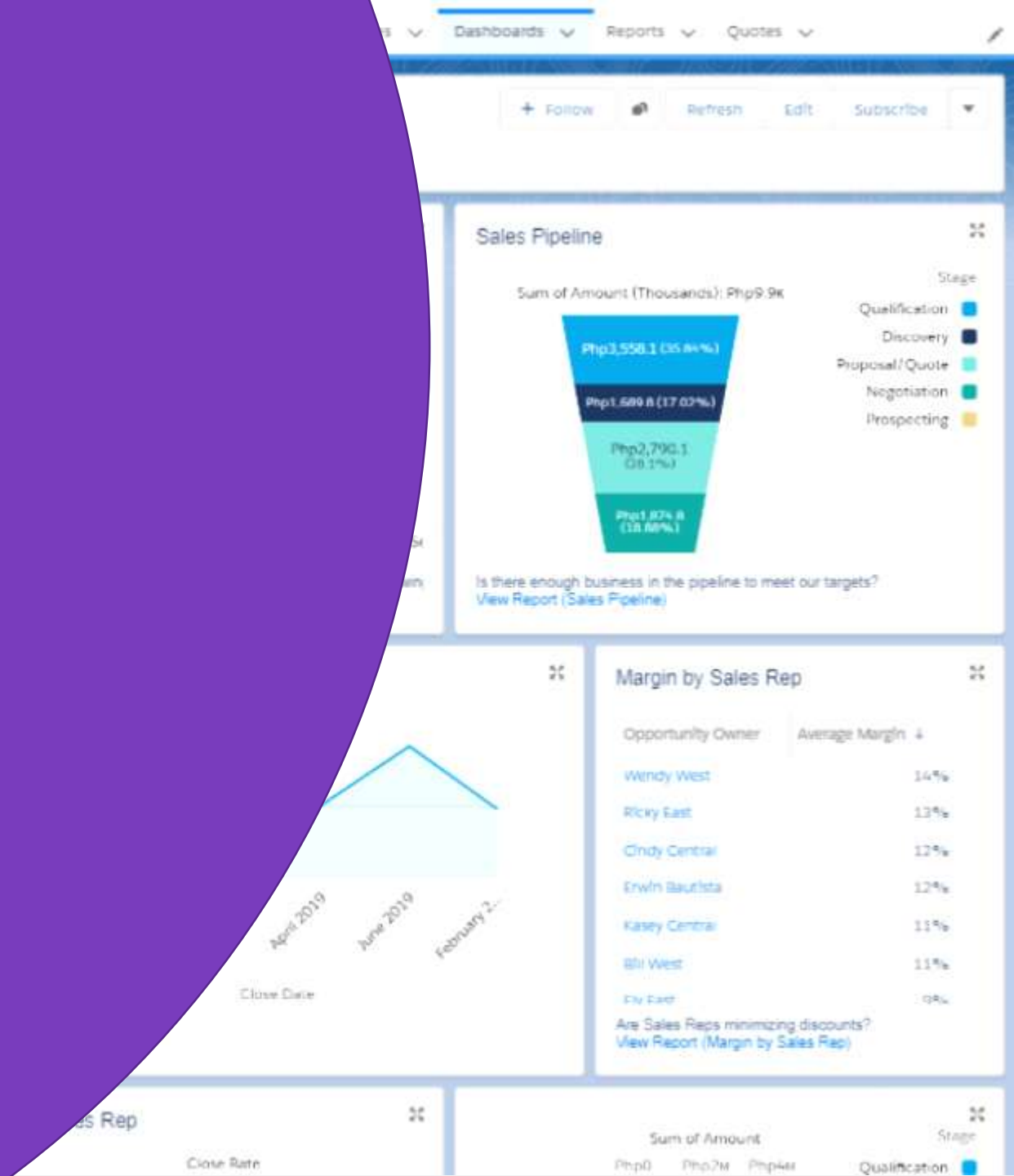
SWITCH TO DEMO ORG





The Fundamentals of a Dashboard

Adding reports, choosing components, storing, and sharing

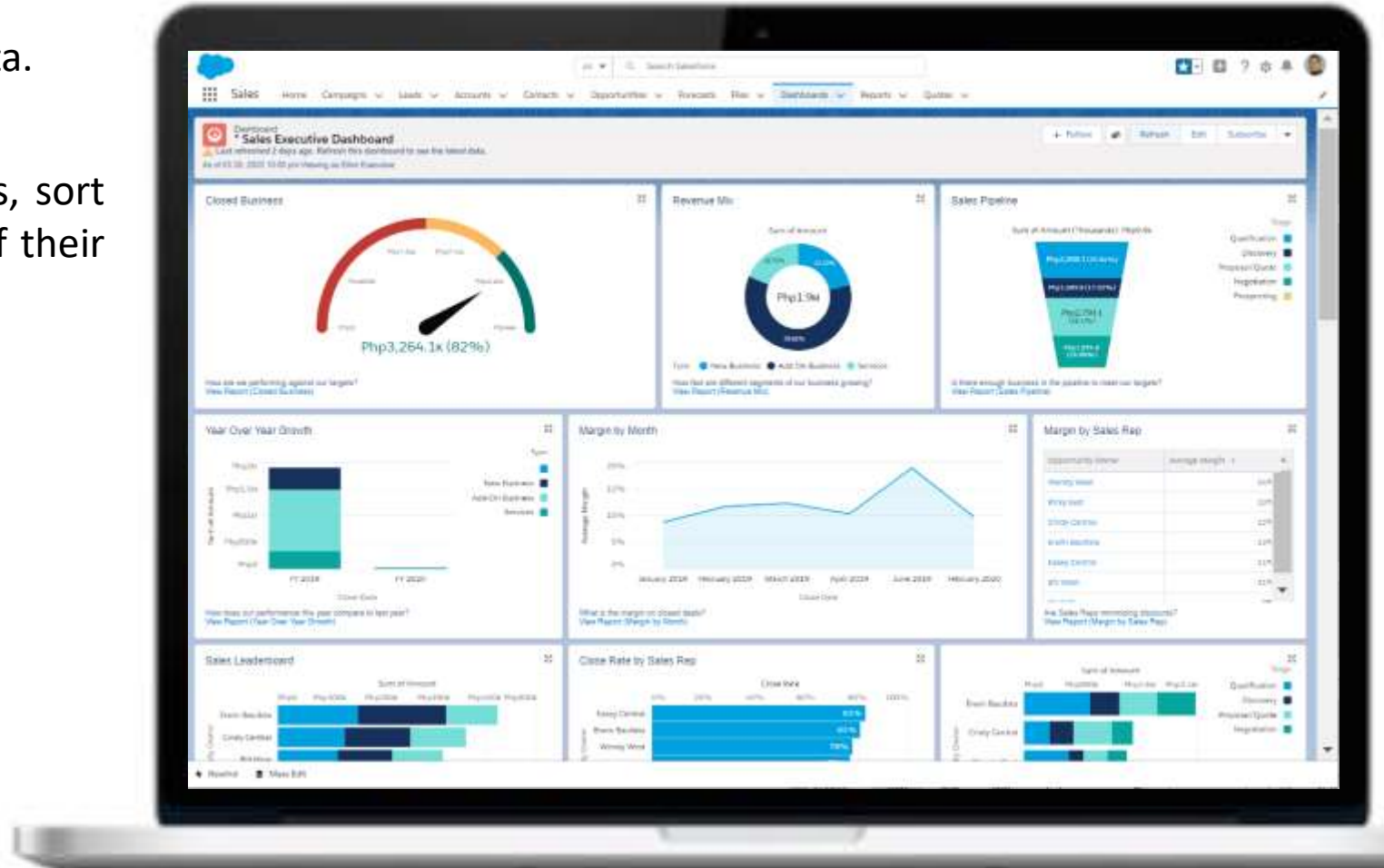


Dashboards



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

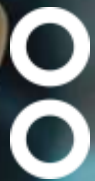




Photo credits

Digitize. Disrupt. Lead.





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



dashboard pack for sales marketing and service package



Home Recommended for You Solutions by Type Product Collections Industry Collections Consultants Ohana COVID-19

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- Solution Type
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 - Content
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- Free
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LISTING	LATEST RELEASE	RATING	PRICE
 Salesforce Adoption Dashboards	2/14/2019	★★★★★ (298)	Free
 AppExchange Dashboard Pack for Sales, Marketing and Service	3/15/2009	★★★★★ (23)	Free
 Salesforce CRM Dashboards	6/20/2011	★★★★★ (21)	Free




Beyond the Basics



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2 of 2 : Salesforce CRM Dashboards in Lightning



Beyond the Basics



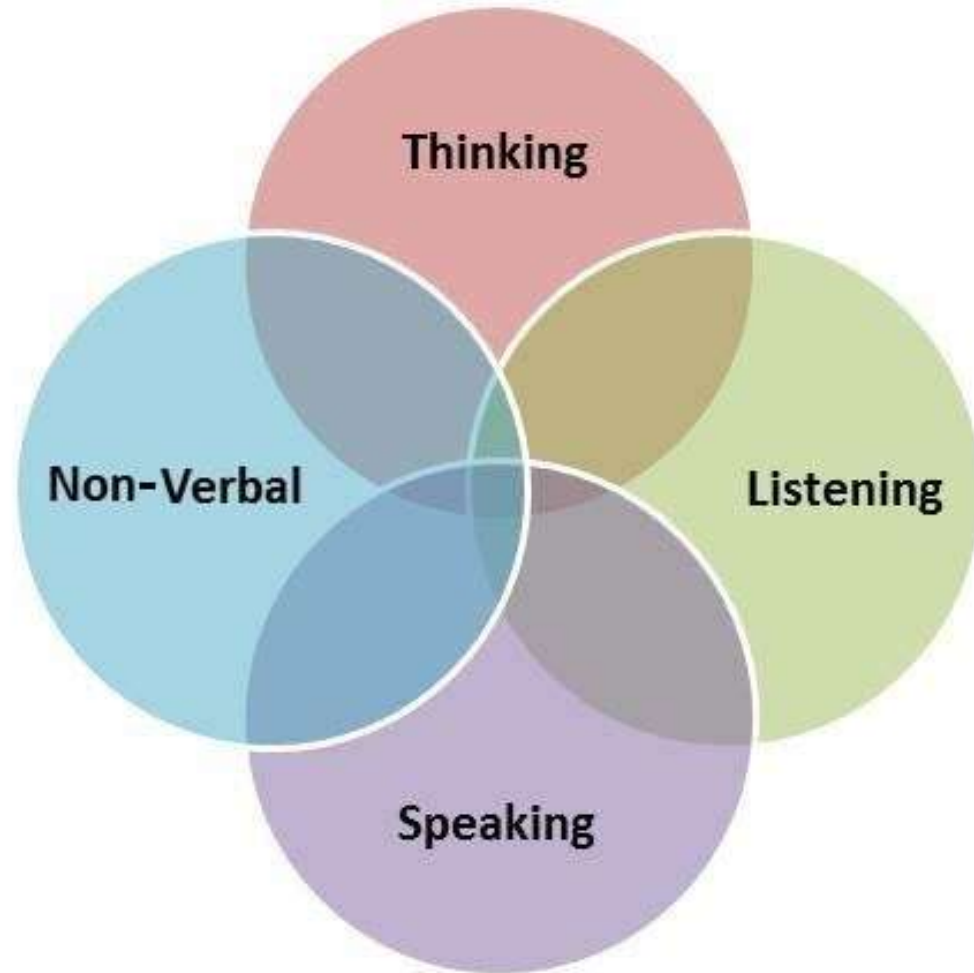
4 Simple Steps to Leveling Up Your Reports & Dashboard Skills

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.

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Thank You !!

