



The One Dashboard Every Admin Needs

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

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Stacy O'Leary

Salesforce Consultant, Blog Writer

5x Certified



Information Gathering

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What questions do users ask you every day?

What are the most important metrics in your org?

Report Categories

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Direct Expenses

Anything that has a direct and immediate cost (in dollars)

Salesforce License Usage

Ensuring that all users log in to Salesforce regularly, and are utilizing the platform

Admin Task Tracking

Items that the Admin needs to work on, like Enhancement Requests

Data Quality

Any data quality issues that need to be regularly reviewed or cleaned up, or trigger monitoring

Dashboard Components: Direct Expenses



Active Users / Licenses

View Report (Active Users by Profile)

API Calls Last 7 Days

Call Date ↑	Sum of Call Count
8/10/2022	286k
8/11/2022	315k
8/12/2022	287k
8/13/2022	241k
8/14/2022	256k
8/15/2022	286k

View Report (API Calls Last 7 Days)

Community/Experience Logins this Month

View Report (Community/Experience Logins this Month)

Active Users / Employees

View Report (Active Users by Profile)

Community/Experience Logins Monthly

Month	Record Count
February 2022	9.7k
March 2022	21k
April 2022	16k
May 2022	19k
June 2022	19k
July 2022	20k
August 2022	9.6k

Login Date/Time



Components are tied to a Direct Expense



Users

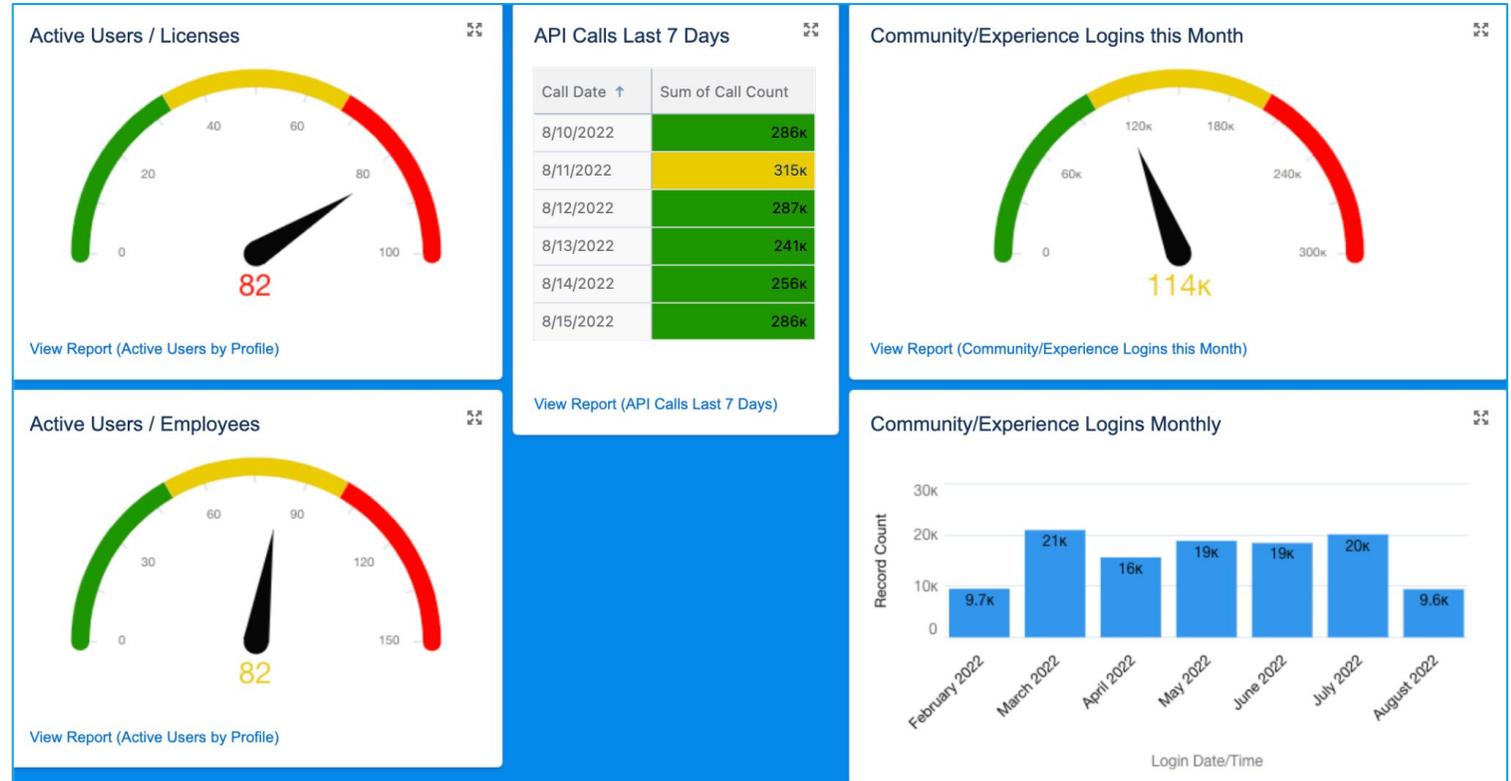
- Under or over-utilizing licenses
- Salesforce User expectations align with Employee Count

API Calls

- Prevent integrations from failing
- Budget in advance for extra API Calls
- Visibility to any unexpected spikes

Community Experience Logins

- Under or over-utilizing licenses
- Good ROI on Community Experience
- Budget in advance for additional licenses



Dashboard Components: Salesforce License Usage



No Logins Last 30 Days

Manager ↑	Email ↑	Record Count
Liane Delouch	abbot.kopps@quicklyconsultingtest.com	1
	adey.liver@quicklyconsultingtest.com	1
	finlay.viggars@quicklyconsultingtest.com	1
	hughie.josilowski@quicklyconsultingtest.com	1
	iorgos.spawell@quicklyconsultingtest.com	1
	winslow.finlry@quicklyconsultingtest.com	1
Rey Turtle	beverlee.salkild@quicklyconsultingtest.com	1
	laney.suett@quicklyconsultingtest.com	1
Total		8

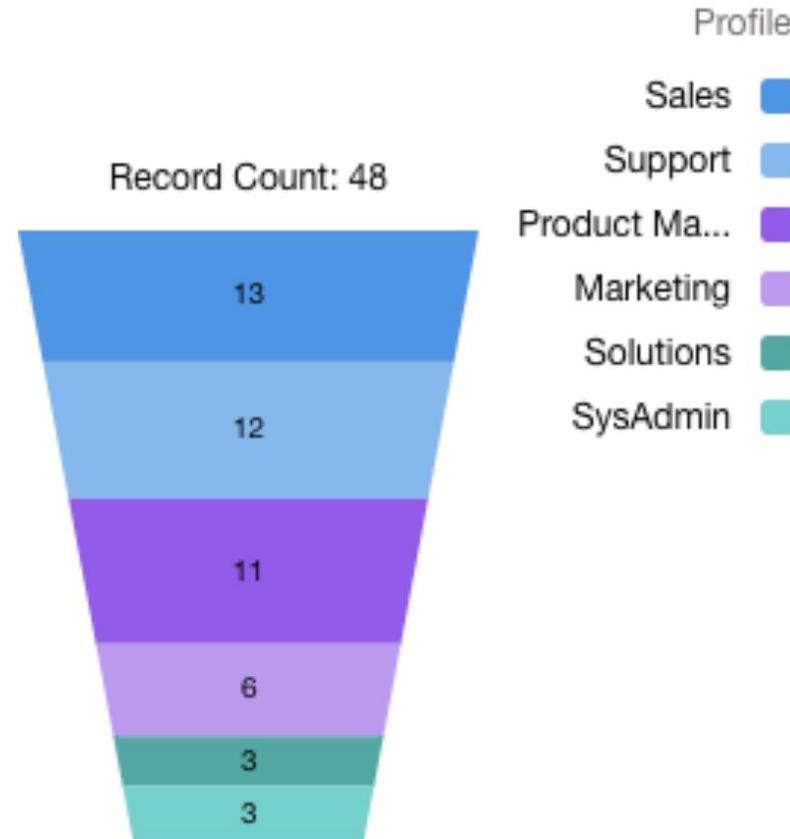
[View Report \(No Logins Last 30 Days\)](#)

New Users Last 30 Days

Manager ↑	Email ↑	Record Count
Jillane Del Monte	huberto.iacobassi@quicklyconsultingtest.com	1
	kaspar.everingham@quicklyconsultingtest.com	1
	leonore.oakenford@quicklyconsultingtest.com	1
Liane Delouch	felicia.charlon@quicklyconsultingtest.com	1
	jacqueline.youle@quicklyconsultingtest.com	1
	morganica.kondratowicz@quicklyconsultingtest.com	1
	roland.reville@quicklyconsultingtest.com	1
	staci.arr@quicklyconsultingtest.com	1
Olympia Bowcher	amalee.nunson@quicklyconsultingtest.com	1
	charyl.schuck@quicklyconsultingtest.com	1

[View Report \(New Users Last 30 Days\)](#)

Users per Profile



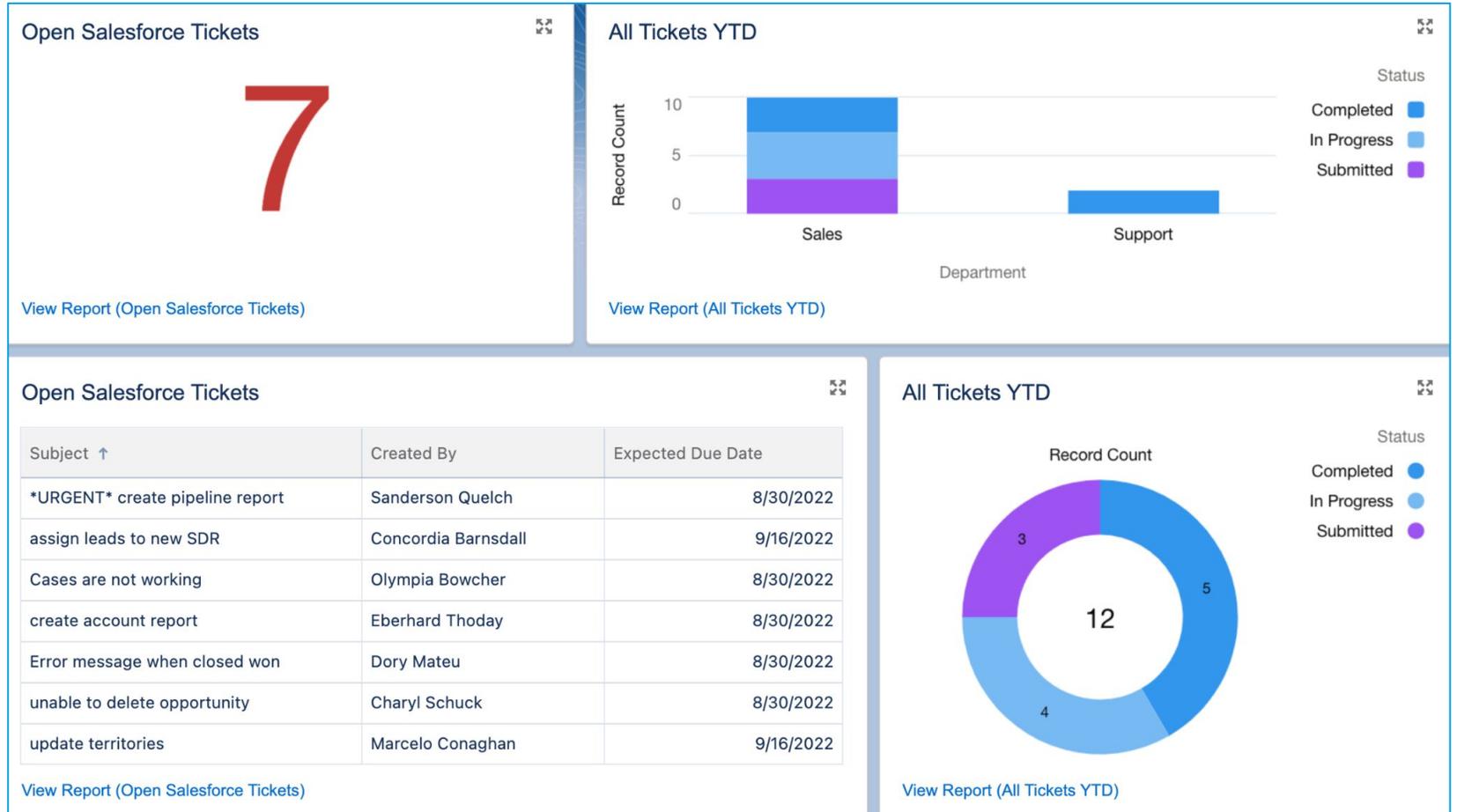
- Each User represents a financial cost
- User actions (or lack thereof) can help or hurt your investment
 - Users that don't log in
 - Newly Added Users
 - Users on the wrong profile



Dashboard Components: Admin Tasks



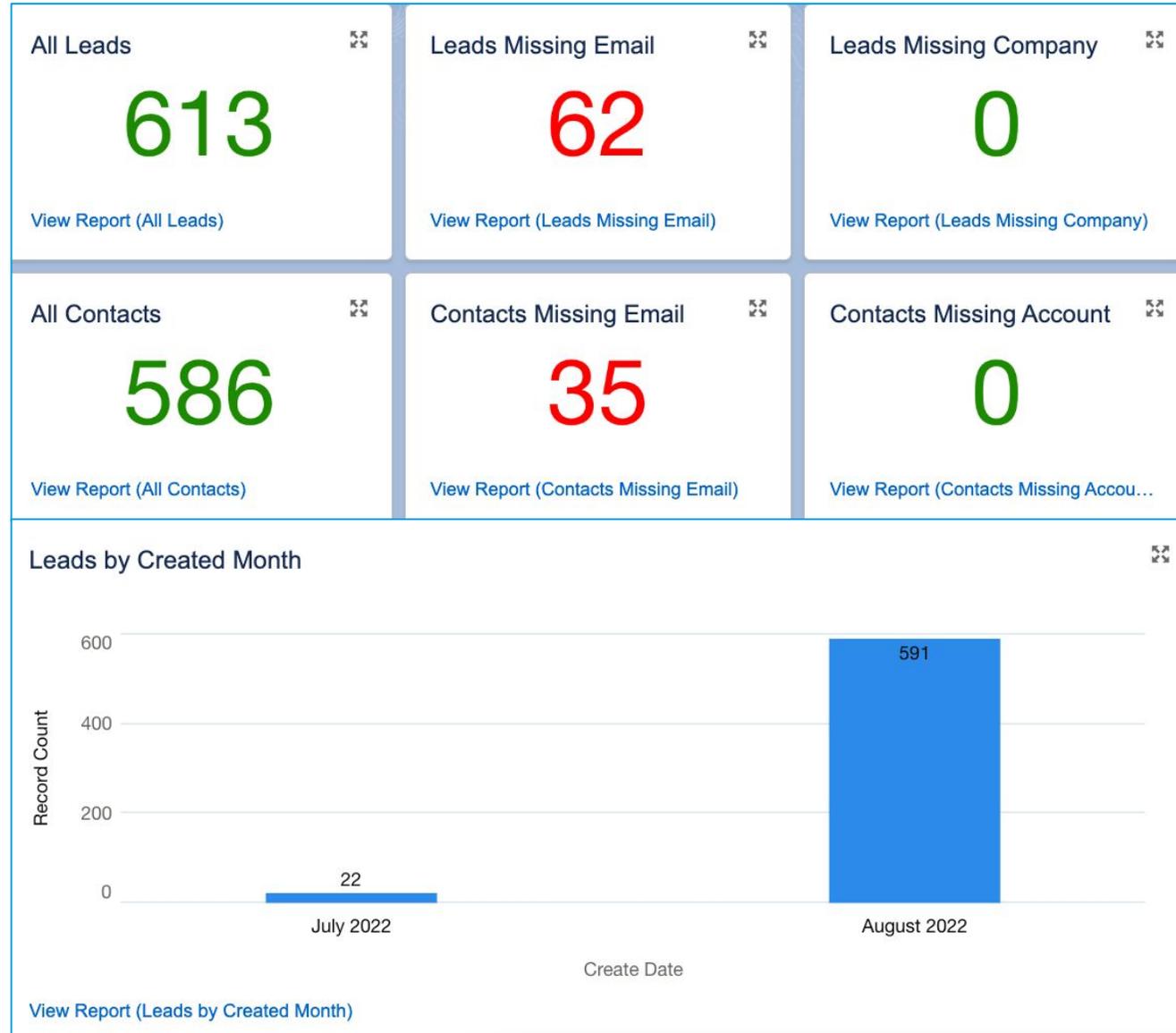
- What is the Admin doing all day?
- Current open Admin Tasks & Projects
- Change Documentation
- Workload Balance



Dashboard Components: Data Quality



- “Good” data quality is unique to each org
- Bad data quality costs time and data storage
- Saving time & data storage = saving money
- Resolve data quality issues when they happen



Elevate Your Dashboard



“Favorite”
This Dashboard

Add to
Homepage
Component

Add Email
Recipients

Make Friends
with HR and
Recruiters



Ready to take action?

1. Decide your critical data points
2. Build your dashboard
3. Run and review daily
4. Save money!



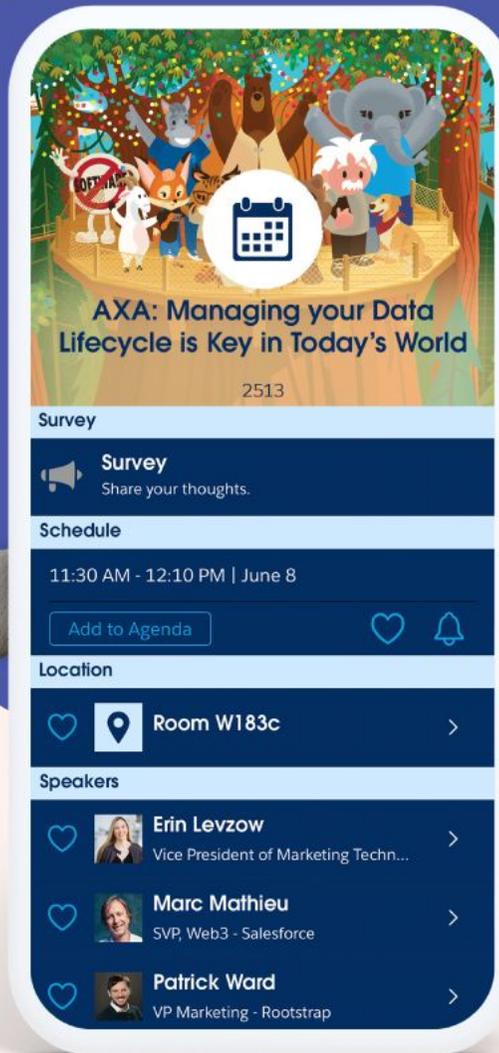


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Additional Dashboard Components

Consider what you need as an Admin in your Salesforce Org

- Current Users over Licenses
- Current Users over Employee Count
- API Calls Daily
- API Calls by User
- API Calls by Day + User
- Community Experience Logins this month
- Community Experience Logins trending over time
- Any additional features that your org pays for (check your Salesforce Contract)
- Users No Logins Last 30/60/90 Days
- New Users Last 30/60/90 Days
- Records Owned per User
- Records Edited per User
- Users by Login Details
- Users per Profile
- Users per Role
- Users per Manager
- Open Tickets
- Open Tickets per Department
- Open Tickets per Object
- Completed Tickets YTD
- Ongoing Projects
- Completed Tickets Trending/M/Q/Y
- Total Number of Records/Object
- Leads/Contacts Missing:
 - Email
 - Phone
 - First Name/Last Name
 - Lead Source
 - Account/Company
- Lead Conversion Trending
- Accounts with No Opps or Contacts
- Duplicate Records
- Open Opportunities with InActive Owners
- Incomplete Opportunities

