

Admin Fundamentals for Education

# Reports & Dashboards

Part 3 of 5

This webinar will begin shortly





# Forward-Looking Statements

This presentation contains forward-looking statements about the Company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth, environmental, social and governance goals, expected capital allocation, including mergers and acquisitions, capital expenditures and other investments, expectations regarding closing contemplated acquisitions and contributions from acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the Company's results could differ materially from the results expressed or implied by the forward-looking statements it makes. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: risks associated with our ability to successfully integrate Slack Technologies, Inc.'s operations; our ability to realize the anticipated benefits of the Slack Technologies, Inc. transaction; the impact of Slack Technologies, Inc.'s business model on our ability to forecast revenue results; disruption from the transaction making it more difficult to maintain business and operational relationships; the impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain service performance and security levels meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; our ability to secure and costs related to data center capacity and other infrastructure provided by third parties; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services beyond the CRM market; the success of our strategy of acquiring or making investments in complementary businesses and strategic partnerships; our ability to compete in the market in which we participate; the success of our business strategy and our plan to build our business; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the valuation of our deferred tax assets and the release of related valuation allowances; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property; uncertainties regarding the effect of general economic conditions; and risks related to our debt and lease obligations.

# Our Admin Fundamentals Journey

Fundamentals for Education



## EDA Deep Dive

Understand EDA  
functionality



## Constituent Engagement

Learn how to  
engage your  
constituents



## Reports & Dashboards

Use data to make  
decisions



## Setup & Automate Cases

Build a supportive  
infrastructure



## Automate with Flow

Learn how to  
automate

# Agenda

What we'll cover today

- 1 Data Quality and Why it Matters
- 2 Create Functional Reports
- 3 Visualize Data with Dashboards
- 4 5 Features to Optimize Reporting
- 5 Next Steps & Resources



# Data Quality and Why it Matters





# Why is Quality Data a Big Deal?

- Data decides where your organization invests
- It dictates the emails you send - as well as when, and how you send them
- It informs your conversations with students, alumni and donors
- It drives what needs to be done next

# What is “Bad” Data?



Data quality can be measured by many criteria

Criteria	Questions to Consider
Accuracy	Does data correctly describe the “real world” object or event?
Completeness	Are all data points captured across all records?
Consistency	Are all data points captured in the same way across all records?
Timeliness	Is your data time-sensitive? Does it need to be archived after a certain period?
Uniqueness	Are all records unique? No duplicates?
Validity	Does data conform to the syntax (format, type, range) of its definition?

# How Do Data Quality Issues Occur?

“Bad” Data can occur due when:

- Users have little or poor training
- There’s no automated prevention in place
- Data hygiene policies are lacking
- Historical data is imported





# Steps to Manage Data Quality



#1

Learn

**Trailhead:**  
[Data Quality Module](#)

#2

Assess

**AppExchange:**  
[Data Quality Analysis Dashboard](#)

#3

Develop a Plan

**Trailhead:**  
[Improving Data Quality Module](#)

**Knowledge Article:**  
[Data Hygiene Schedule and Actions for New Admins](#)

#4

Clean your Data

**Data Management Tools:**  
[App Comparison Doc](#)

**H&T Article:**  
[Salesforce Duplicate Management Tools](#)

#5

Document

**Blog:**  
[5 Documentation Strategies to Improve Your Salesforce Org](#)

**Video:**  
[Best Practices for Documenting Your Salesforce Org](#)



For more tips on maintaining your data quality check out our [Healthy Org Workbook](#)

# Create Functional Reports



# What is a Report?

## Ways to Understand Reporting



A Report is NOT:

- Data
- Metrics
- Numbers

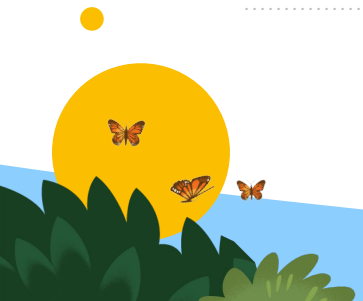
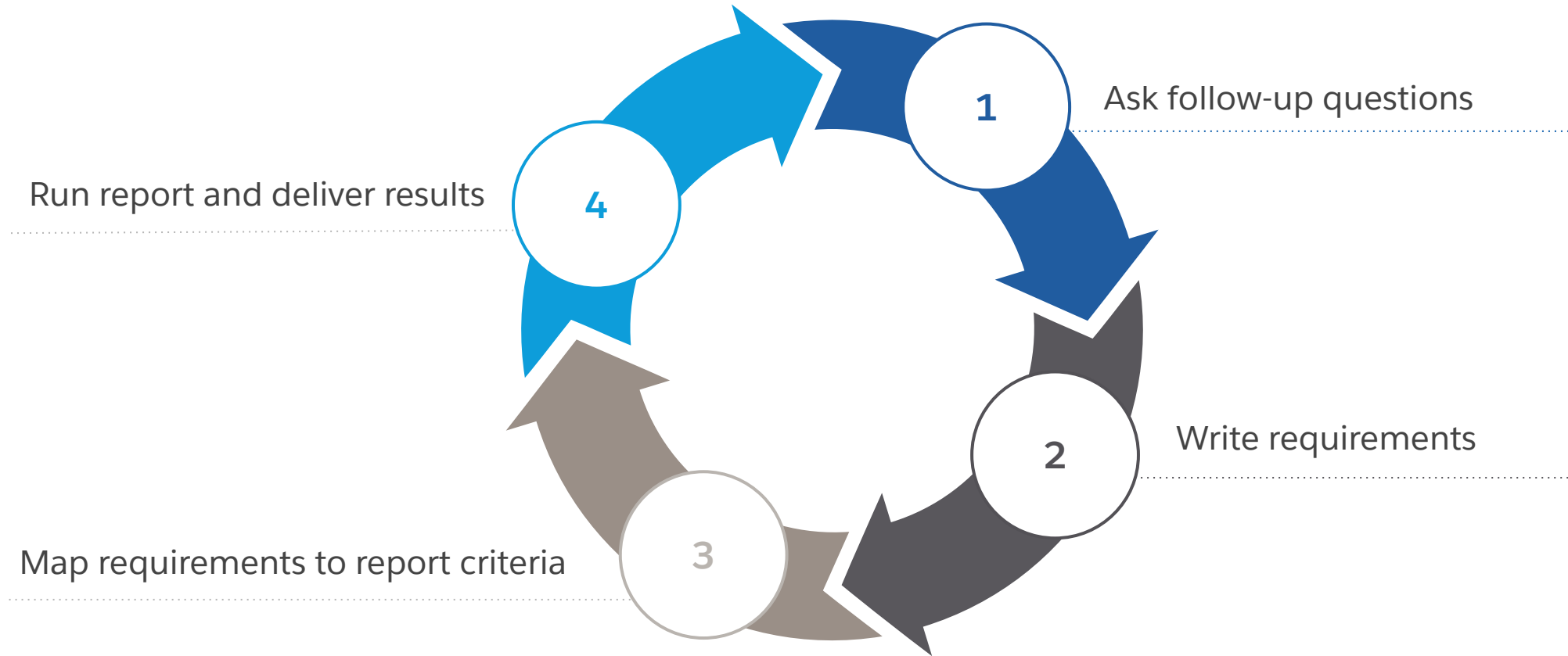
A Report IS:

- An answer to a question
- A tool to help make decisions

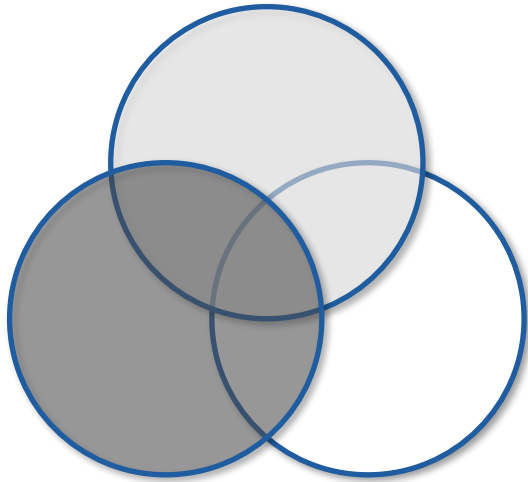


# Convert Questions to Reports

Address Your Staff Needs



# Three Things That Drive Every Report



**Report  
Type**



**Filter  
Criteria**



**Format**

# Use Report Types to Build Faster



### Choose Report Type

AllAccounts & ContactsOpportunitiesForecastsCustomer Support ReportsLeadsCampaignsActivitiesContracts and OrdersPrice Books, Products and AssetsAdministrative ReportsWork.com CalibrationWork.com

AccountsAccounts and Current AddressContacts & AccountsContacts & Accounts and Current AddressContacts & Accounts and Current AddressContacts & Accounts and Internship/Co-op TermAccounts with Partners/RelationshipsAccounts with Partners/Relationships and Current AddressAccount with Account TeamsAccount with Account Teams and Current AddressAccounts with Contact RolesAccounts with Contact Roles and Current Address

Cancel

Continue



# Types of Reports



1

## Tabular

Report: Opportunities Advancement: Donations by Campaign						
Total Records 4						
	Close Date	Probability (%)	Fiscal Period	Age	Created Date	Opportunity Owner
1	10/10/2019	90%	Q4-2019	0	3/7/2020	Valerie Northeast
2	10/8/2019	98%	Q4-2019	0	3/7/2020	Valerie Northeast
3	11/5/2019	90%	Q4-2019	0	3/7/2020	Ricky Southeast
4	1/30/2020	90%	Q1-2020	0	3/7/2020	Adrienne Advancement

3

## Matrix

Report: Leads New Leads Report									
Total Records 1,424									
Lead Source	Industry	-	Agriculture	Apparel	Banking	Biotechnology	Chemicals	Communications	
-	Record Count	435	0	0	10	0	0	11	
Website	Record Count	3	2	3	2	1	2	0	
Social Media	Record Count	10	6	2	4	3	3	9	
Referral	Record Count	1	0	0	0	0	0	0	
Data.com	Record Count	3	0	0	0	0	1	0	
Partner	Record Count	0	0	0	0	0	0	0	

2

## Summary

Report: Program Enrollments with Contact Program Enrollment by Class		
Class Standing	Program	Contact: Last Name
Freshman (59)	BA Business Administration (16)	Hamilton
		Howell
		Nichols
		Mills
		Fisher
		Stanley
		Jenkins
		Reynolds
		Reed
		Harrison
		Murphy
		Lewis
		Griffin
		Payne
		Cunningham

# Using Filters



**Cross Filters**

Contacts with Affiliated Accounts ×

Add Affiliated Accounts Fil... Q

Role equals Student ×

Status equals Current ×

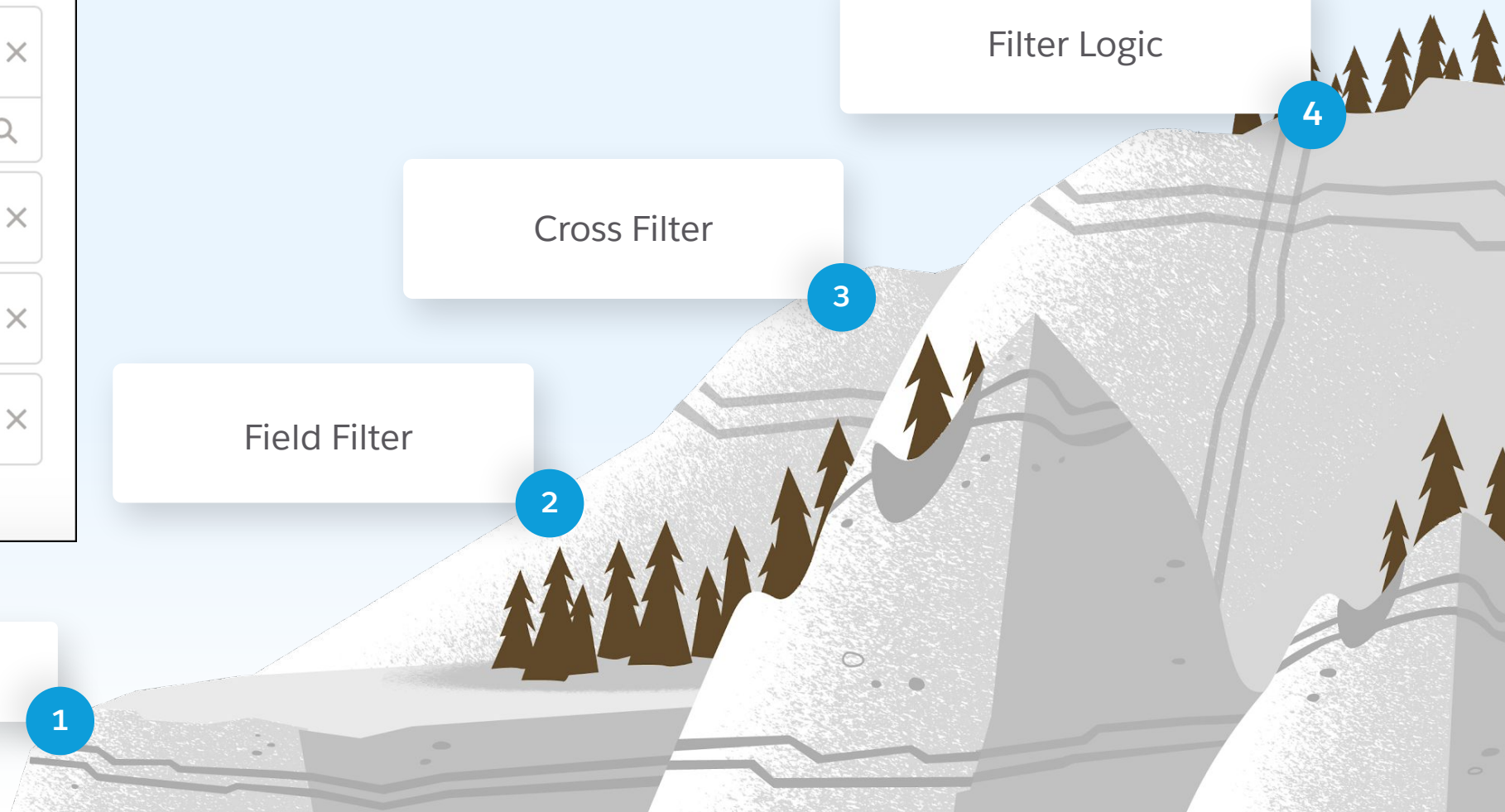
Organization contains school ×

Standard Filter

Field Filter

Cross Filter

Filter Logic



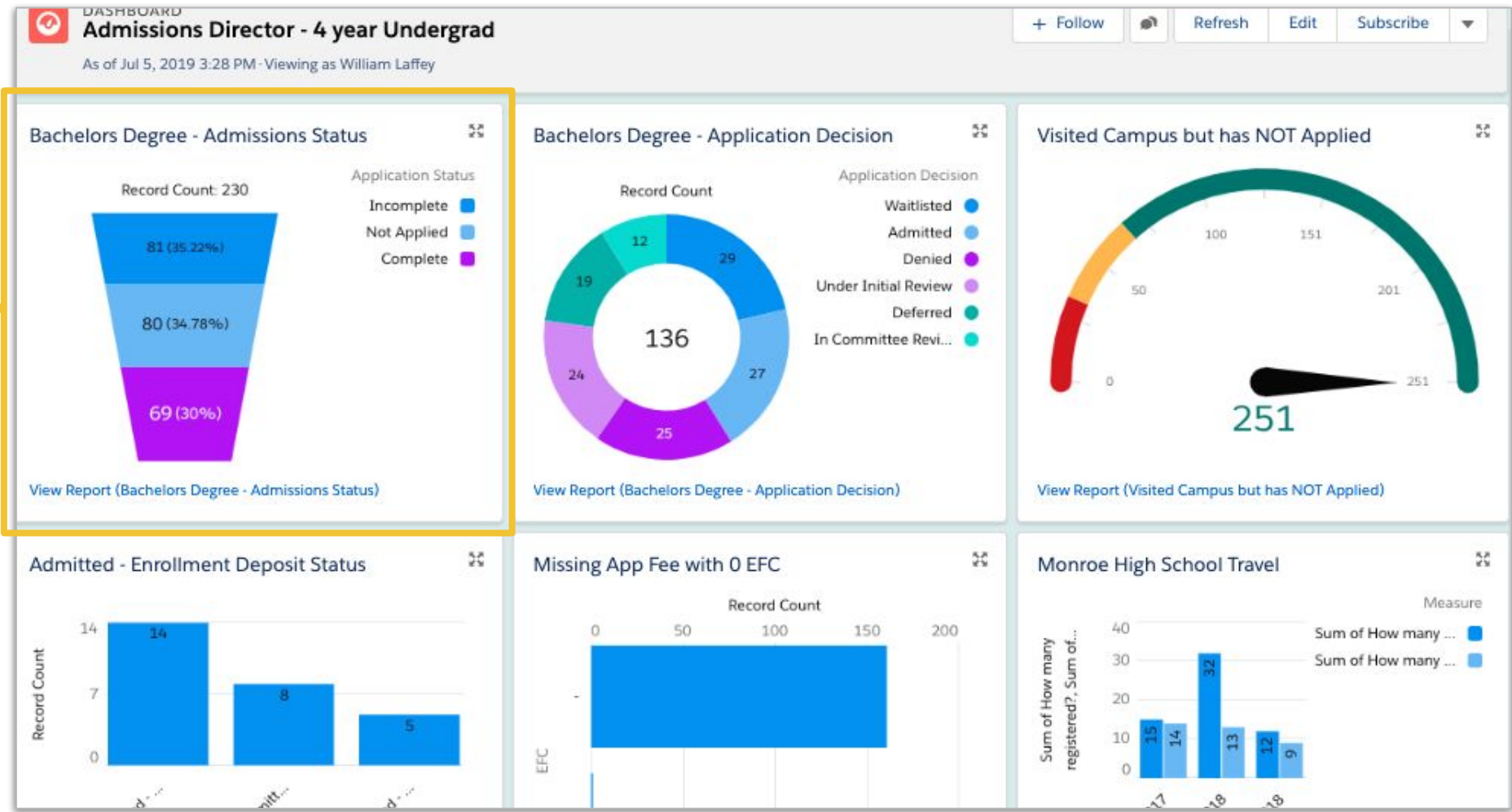
# Visualize Data with Dashboards



# Display Your Report Data



Dashboard Component



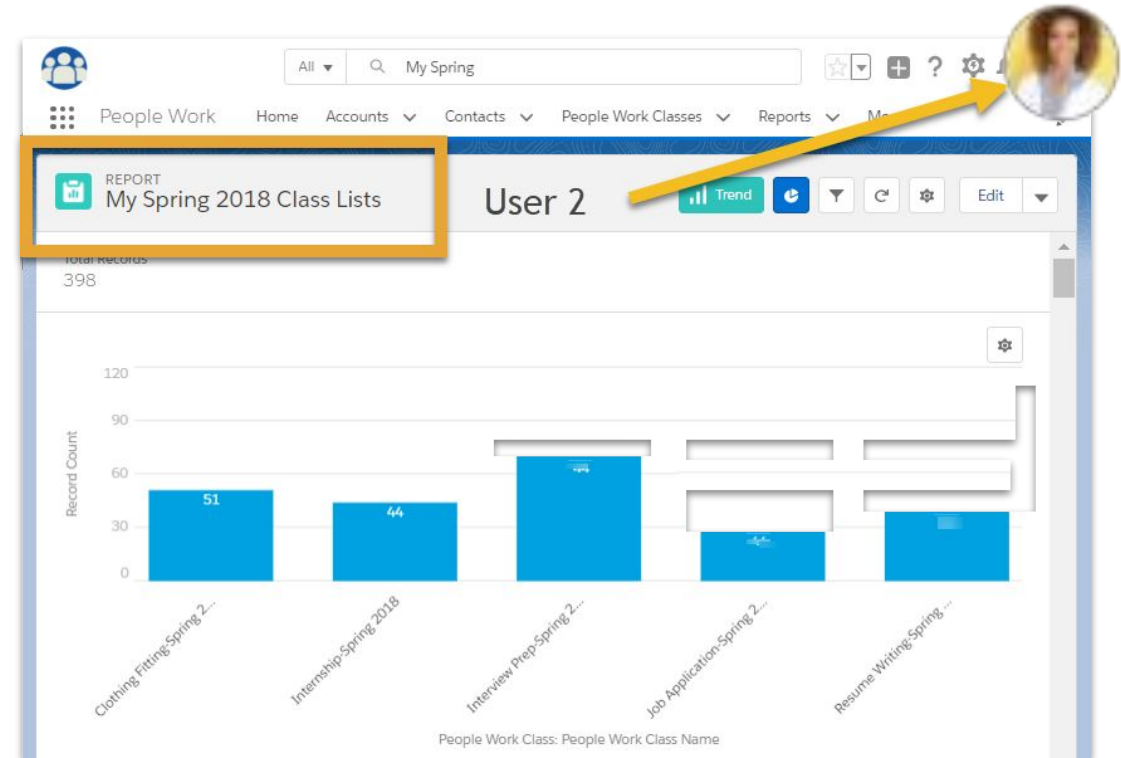
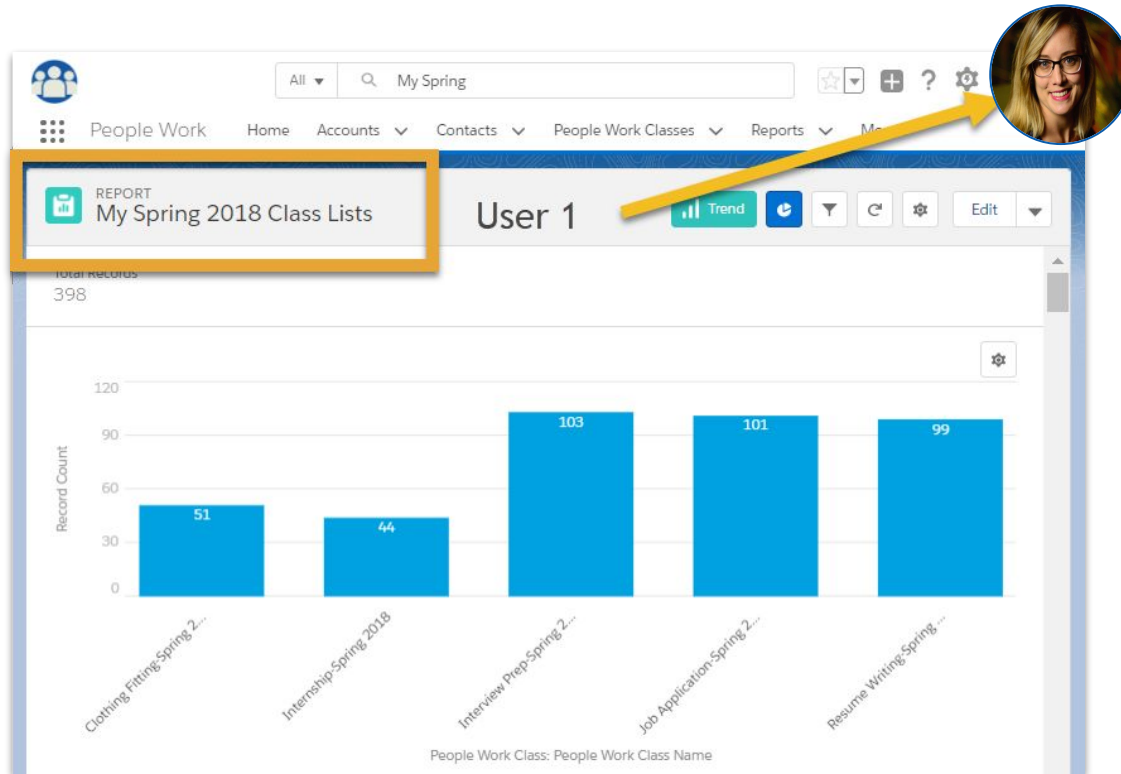
Plan

Build

Think

# Protect Your Data

You need it and it's built in!



Dashboards and Reports honor your security model, so the same report may display different results to your users based on data ownership or user role.

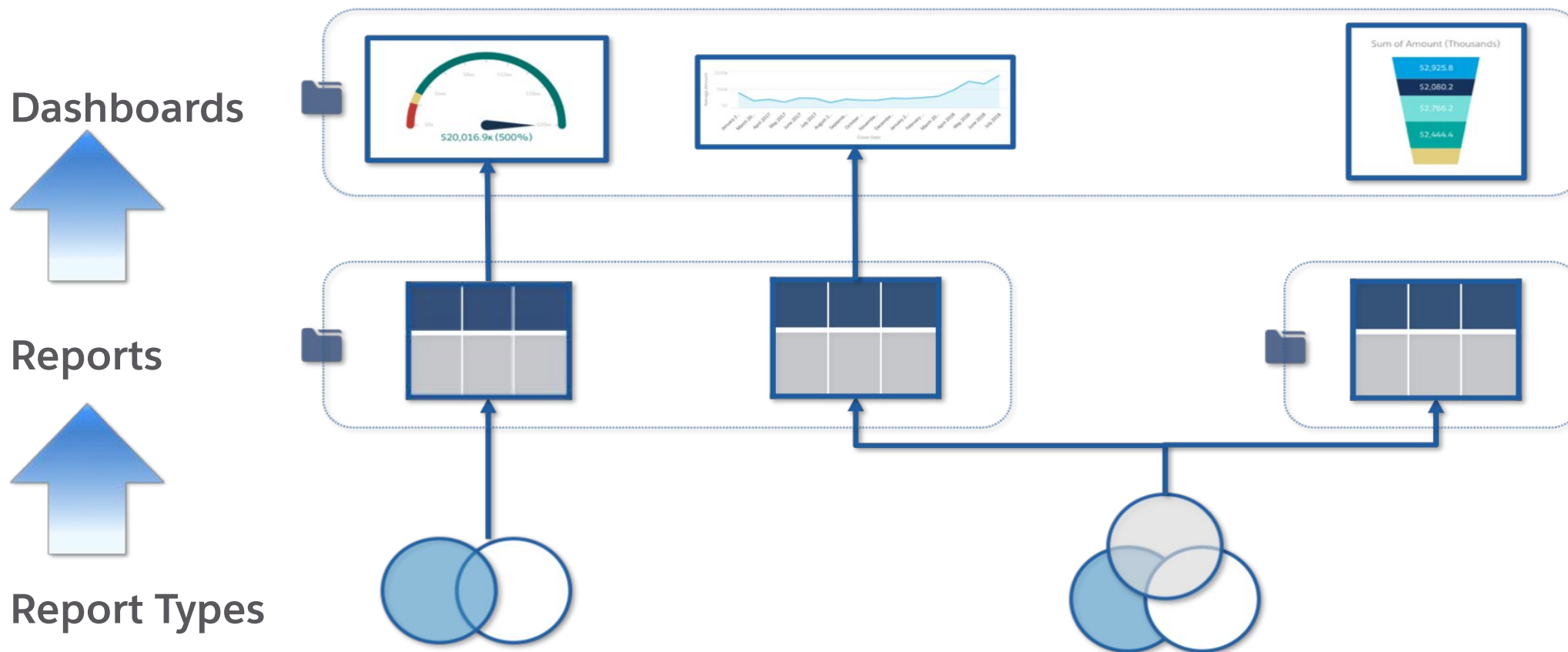




# Put it All Together



Used Together, You'll Get Stronger Data and Meaningful Insights





# 5 Features to Optimize Reporting



# Custom Report Types



- Define the relationships between objects displayed to users creating and customizing reports
- Select which objects' fields can be used as columns in reports

This report type will generate reports about Accounts. You may define which related records from other objects are returned in report results by choosing which objects to include in the report.

**A Accounts**  
 Primary Object

**B Course Connections**  
 A to B Relationship:  
☒ Each "A" record must have at least one related "B" record.  
☐ "A" records may or may not have related "B" records.

**C Term Grades**  
 B to C Relationship:  
☒ Each "B" record must have at least one related "C" record.  
☐ "B" records may or may not have related "C" records.

(Click to relate another object)

# Row Level Formulas



- Reduce 'clutter' with less custom formula fields
- Calculate values for every record in a report

The screenshot shows the 'Edit Row-Level Formula Column' dialog box. On the left, the 'Functions' tab is active, displaying a search bar and a list of functions under 'Date & Time (16)'. The 'ROUND' function is highlighted, with its syntax and description shown below. An 'Insert >' button is at the bottom of the function list. On the right, the 'Column Name' is 'Asking Amount', and the 'Description' field is empty. The 'Formula Output Type' is set to 'Number' and 'Decimal Points' is set to '0'. The 'Formula' field contains the expression `1 ROUND(AMOUNT*1.25, -1)`. A toolbar with mathematical operators and a 'Help' icon is above the formula field. A green checkmark and the word 'Valid' are shown below the formula. At the bottom right, there are 'Cancel' and 'Apply' buttons.

**Edit Row-Level Formula Column**

**Fields Functions**

Search Functions

▼ Date & Time (16)

- $f_x$  ADDMONTHS
- $f_x$  DATE
- $f_x$  DATETIMEVALUE
- $f_x$  DATEVALUE

**ROUND(number,num\_digits)**  
Rounds a number to a specified number of digits  
[Help with this function](#)

Insert >

\* Column Name: Asking Amount  
Description:

Formula Output Type: Number  
Decimal Points: 0

\* Formula: `1 ROUND(AMOUNT*1.25, -1)` [? Help](#)

✓ Valid

Cancel Apply

# Field to Field Filtering



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

Stage	Opportunity Name	Fiscal Period	Amount	Type	Lead Source	Probability (%)	Created Date	Close Date
Prospecting (1)	Opportunity for Gordon [2011]	Q4-2016	USD 805,927.80	New Business / Add-on	Public Relations	10%	6/2/2016	11/1/2016
Subtotal			USD 805,927.80 Avg: USD 805,927.80					
Needs Analysis (3)	Opportunity for Hopkins [2378]	Q4-2016	USD 479,196.00	New Business / Add-on	Partner	20%	6/17/2016	11/2/2016
	Opportunity for Webb [2144]	Q4-2016	USD 811,500.00	New Business / Add-on	Web	20%	6/3/2016	11/1/2016
	Opportunity for Daniel [2005]	Q3-2016	USD 91,043.00	New Business / Add-on	Web	20%	6/16/2016	9/1/2016
Subtotal			USD 1,381,739.00 Avg: USD 460,579.67					
Value Proposition (7)	Opportunity for Marshall [2389]	Q4-2016	USD 238,500.00	New Business / Add-on	Web	50%	6/20/2016	12/3/2016
	Opportunity for Weaver [2392]	Q3-2016	USD 11,443.20	New Business / Add-on	Trade Show	50%	6/29/2016	9/1/2016
		Q2-2016	USD 299,174.00	New Business / Add-on	Web	50%	6/19/2016	6/1/2016
		Q1-2017	USD 30,562.00	New Business / Add-on	Web	50%	6/22/2016	2/1/2017
		Q4-2016	USD 59,500.00	New Business / Add-on	Seminar - Internal	50%	6/24/2016	11/1/2016
		Q1-2017	USD 510,220.00	New Business / Add-on	Web	50%	6/22/2016	2/1/2017
		Q3-2016	USD 1,303,088.00	New Business / Add-on	Web	50%	6/1/2016	8/1/2016
Subtotal			USD 2,452,487.20 Avg: USD 350,355.31					
		Q2-2016	USD 3,518,764.00	New Business / Add-on	Employee Referral	60%	6/1/2016	6/1/2016
	Opportunity for Thornton [2380]	Q1-2017	USD 726,768.00	New Business / Add-on	Web	60%	6/19/2016	1/2/2017
	Opportunity for Cruz [2395]	Q4-2016	USD 228,134.00	New Business / Add-on	Word of mouth	60%	6/15/2016	10/1/2016

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒ Conditional Formatting: ☐ Currency: USD

**Filters:**

- Lead Source not equal to ""
- Type equals New Business / Add-on
- Close Date

**Filter by Close Date**

Operator: equals

Type: Field Value

Field: Created Date

Locked: ☐ Cancel Apply

- Compare values for two report fields

# Cross Filters

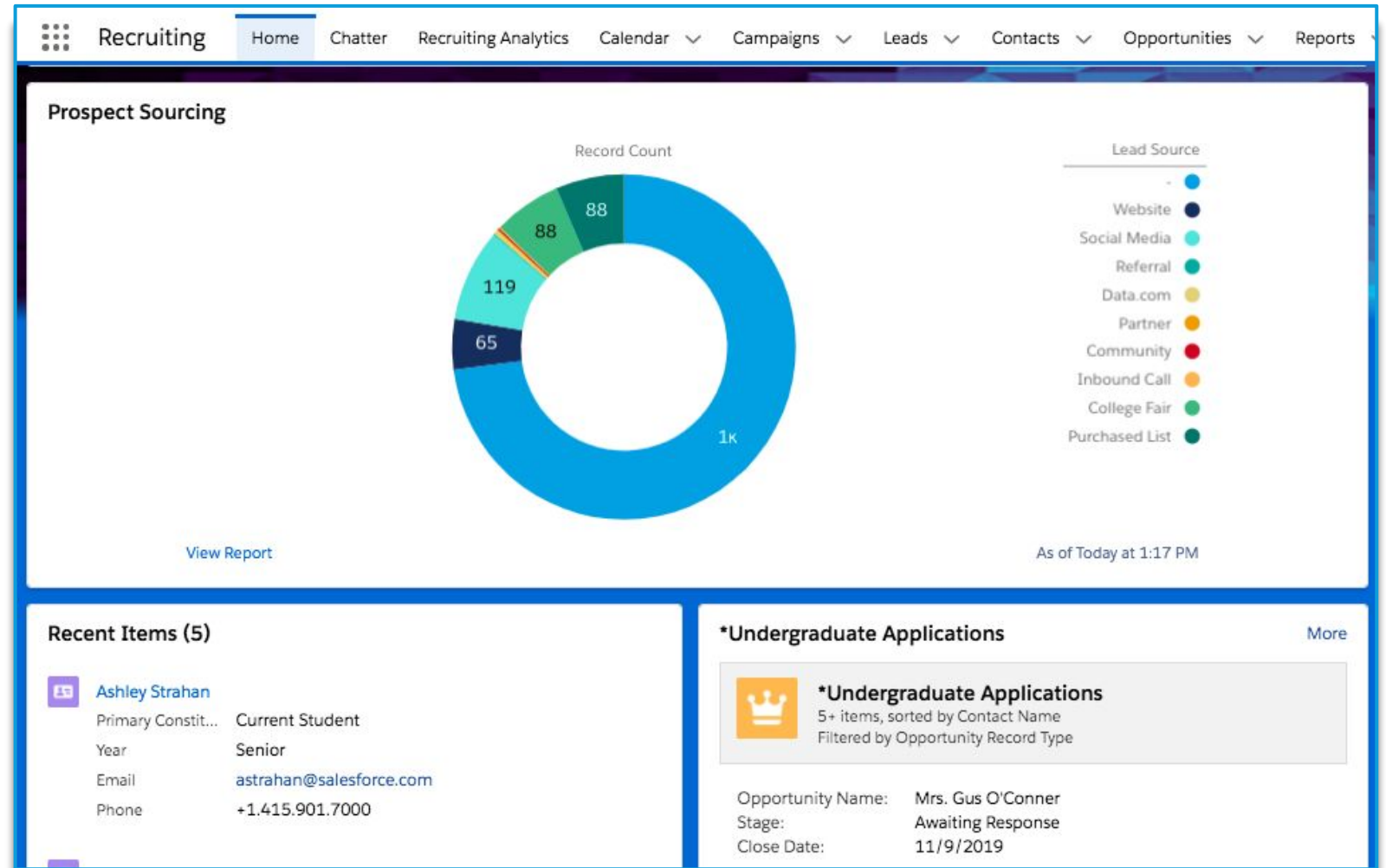
- Increase trust in data by finding:
  - Missing information
  - Contradictory information
- No need to build custom report type!

The screenshot displays the Salesforce report builder interface. At the top, there are tabs for 'Outline' and 'Filters' (indicated by a blue circle with the number 3). A notification bar at the top right states: 'To see the latest edits, refresh the preview. Refresh'. The 'Filters' section on the left contains a search bar 'Add filter...', a filter 'Show Me My contacts', and a date range filter 'Created Date Current FQ (Oct 1, 2020 - Dec 31, 2020)'. Below this is the 'Cross Filters' section, which shows a filter 'Contacts with Cases' and an 'Add Cases Filter' button. An 'Edit Filter' dialog is open, showing 'Show Me' set to 'Contacts' with 'with' as the relationship, and 'Secondary Object' set to 'Cases'. The dialog has 'Cancel' and 'Apply' buttons.

# Embedded Reports



- Surface important information in the Home page
- Easy way to check in on ongoing projects





# It's Demo Time!

Let's look at Reports & Dashboards



**Scenario:** Cloudy University Student Services team would like to see which of their students have open cases with the Academic Advising team

**Scenario:** Cloudy University Advancement team would like to compare their donations to projections

**Scenario:** Cloudy University Admissions team would like to quickly see where their prospective students are coming from

# Recommendations

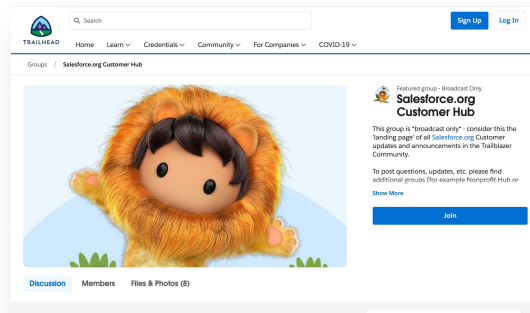
Learn next steps and discover  
helpful resources



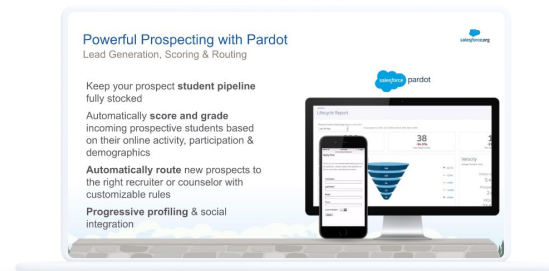
# Three Things You Can Do Today



[Explore Trailhead](#)



[Go to the Trailblazer Community](#)



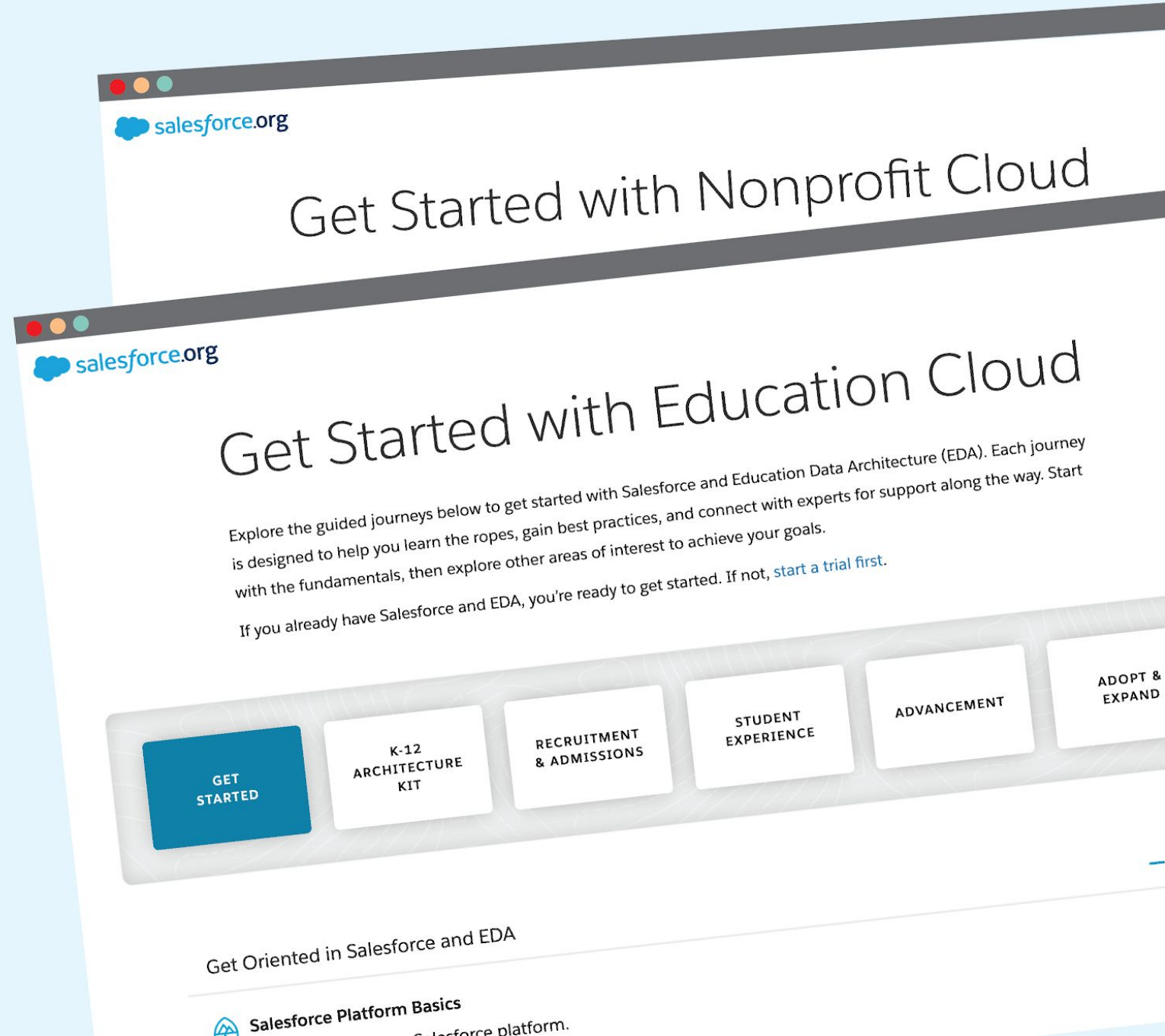
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NEW

# Learning Paths to Help You Get Started

A guided path to success. Find the resources and experts you need to get started—all in a one-stop-shop.

- [Get Started with Nonprofit Cloud](#)
- [Get Started with Education Cloud](#)





# Need Hands-On Support?

Apply for the Salesforce.org Pro Bono Program!



Apply for help with tasks such as **Importing Data** or **Automating Business Processes**



**Match** with a Salesforce Volunteer for up to 20 hours of project support

**Apply for Pro Bono Support**

[sfdc.co/probonosupport](https://sfdc.co/probonosupport)





# Thank You