Housekeeping

- Fire Alarm procedure
- Facilities
- Course length
- Feedback forms
- Questions during and after
- Workshop based approach
About Third Sector IT

• We provide Salesforce implementation, training and support
• Training can be classroom based, on-site and/or bespoke
• Training available as individual ‘seats’, as part or a support contract, or as a bulk discount
Introduction

- Please introduce yourself
- Salesforce experience (if any)
- Specific goal you have for today
Applicability

• Not everyone’s Salesforce org is the same

• 98% of what you learn today will be relevant to your unique customisations

• If you’re a Non-Profit or Charity
  – Accounts = Organisations
  – Opportunities = Donations/ Grants
Course Goals

- Understand the difference between views and reports. Describe the capabilities of each
- Understand Tabular, Summary and basic Matrix reports and which to use for a particular task
- Produce, Modify, and Save Views, Tabular Reports and Summary Reports
- Use dashboards to display graphs and charts
## Overview

<table>
<thead>
<tr>
<th>Views</th>
<th>The Excel Worksheet approach, single object and no grouping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabular Reports</td>
<td>A list style report, with numerical info such as sum</td>
</tr>
<tr>
<td>Summary Reports</td>
<td>Grouping features allow for powerful numerical analysis</td>
</tr>
<tr>
<td>Matrix</td>
<td>Complex data relationships with vertical and horizontal grouping</td>
</tr>
</tbody>
</table>
Views

- Great for segmenting data and creating useful lists
- Accessed through tab home pages
- A number of views exist by default
- Order/sort data
- Inline editing to update records – careful!
Creating a Custom View

1. Click ‘Create New View’ on Account homepage
2. Give the view a useful name
3. Specify filter criteria and filter logic
4. Choose which fields you wish to display
5. Set view visibility (admins only)
6. Click ‘Edit’ to change settings
Filter Logic

- By default view criteria is 1 AND 2 etc
- Use filter logic to change this to OR
- Can use advanced filter logic such as
  - 1 OR 2 OR 3
  - 1 AND (2 OR 3)
Create Custom Views

1. All Accounts in London or Bristol
   I. How many are there?
   II. Edit your view to only show ‘Customer’ Accounts, how many now?

2. All ‘Open’ Opportunities with an Amount > 500
   I. How many are there?
   II. What is the largest Opportunity Amount?
Bonus Points!

1. Add the Contact Phone field to your Accounts view

2. What is the total value of Opportunities with an Amount > 500?
View Limitations

• Cannot span multiple objects (i.e. no Contact & Account data in same view)
• No grouping or numerical analysis (i.e. no Sum or Average)
• Maximum of 2000 records
• Cannot export from a view
Views Quiz

1. What tab do you click on to find views?
2. Can a view show Accounts who are classified as Type: Partner?
3. Can a view show Accounts with high value Opportunities?
4. Can a view show Opportunities based in London?
5. What is a feature of views that makes it possible to edit data quickly?
6. Who can make a view that everyone sees?
7. Can you export and/or print from views?
Tabular Reports

- Most basic of the three types of reports
- Perfect for lists - address list, phone list, donor list
- Can provide the sum, min/max and average of number columns
- Allow reporting on multiple objects
Creating a Tabular Report

1. Go to the Reports tab
2. Click ‘New Report’
3. Choose a report type
4. Click ‘Create’
5. Add fields and filters
6. Click ‘Run Report’
7. Save in a report folder
Report Builder

• Filters
  – Specify report criteria and filter logic
  – Show My/All records and change date range
• Fields
  – Drag and drop onto the report
  – Sum, min/max and average
  – Custom fields are hiding at the bottom
• Preview – limited to 50 rows
Report Viewer

- Change My/ All and date range filters
- Show/ Hide Details
- Printable View and Export Details
- Only shows first 2000 records – export to see them all
- Re-run or schedule (max one per hour per org)
- Customize - back to report builder
Report Folders

- You can always save in ‘My Personal Custom Reports’
- Salesforce comes with dozens of pre-made reports
- Reports cannot be moved or renamed, but can be re-saved (Save As) with a new name and location
Create Tabular Reports

1. All Contacts associated with Accounts in London
   I. Remove all columns and add ‘Account Name’, ‘Account: Address’, ‘# Employees’, ‘Contact: Phone’ and ‘Contact: Email’
   II. Save report as ‘Account List’

2. All ‘Open’ Opportunities with an Amount > 500
   I. What is the average Amount?
   II. What is the total value of these Opportunities?
   III. Save report as ‘Open Large Opps’
Bucket Fields

- Allow you to categorise records without using complicated formulas
Creating a Bucket Field

1. Click ‘Add Bucket field’ in report builder
2. Choose source column
3. Give the field a useful name
4. Define ranges
5. Click ‘OK’
Create a Bucket Field

1. Open the ‘Account List’ report you saved earlier and ‘Customize’
   I. Create a new bucket field called ‘Account Size’
   II. Choose ‘Employees’ as the source column
   III. Define $\leq 50$ as ‘Small’
   IV. Add a new range and define $> 500$ as ‘Medium’
   V. Define $>$ as ‘Large’
   VI. Click OK
Summary Reports

- Provide summary information using groups
- Group to three levels
  - Grouping
  - Sub-grouping
  - Sub-sub-grouping!
- Calculate sum, average, min/max per group
- If you’re looking for data ‘by’ or ‘grouped by’ you need to use a summary report
Creating a Summary Report

One of three ways:

1. In report builder change ‘Tabular Format’ to ‘Summary Format’. Drag a field into the green bar to group by it

2. In report builder, hover over a column header, click the triangle and click ‘Group by this Field’

3. In Report Viewer select a field in ‘Summarize information by’ menu
Create Summary Reports

1. Open the ‘Open Large Opps’ report you saved earlier and ‘Customize’
   I. Group the report by ‘Stage’
   II. What is the total value of Opps in ‘Contract Sent’
   III. Save As to create a new report ‘Open Opps by Stage’
   IV. Group the report again by Close Date to create a sub-group. Group dates by ‘Calendar Month’
   V. In which month are the greatest total value of Opps closing?
   VI. Save As to create a new report ‘Open Opps by Close Date and Stage’
Matrix Reports

- Most complex of the three types of Reports
- Allows both horizontal and vertical grouping
- Show complex data relationships e.g. Stage horizontally and Close Date vertically
- Takes a lot of practice!
Creating a Matrix Report

1. Open ‘Open Opps by Stage’ report and ‘Customize’
2. Change from ‘Summary Format’ to ‘Matrix Format’
3. Drag ‘Close Date’ into column grouping
4. Group dates by ‘Calendar Month’
5. Run Report
6. Hide details and record count
Report Security

• Your organisation may not allow your profile to create reports
• Access to Report Folders may also be restricted, entirely or to read-only
• Even if you can create and run reports from all folders, you can only report on data you otherwise have access to
Report Limitations

- Only displays first 2000 records – until you export
- Can’t ‘drill down’ to view data
- Can’t directly edit data
Reports Quiz

- Can you trust the numbers in the Report Builder preview?
- Name two ways to create a summary report from a tabular report?
- How do you move a report from one folder to another?
- How do you calculate the sum and average of a number column?
- If you need things ‘grouped by’. What type of report should you use?
- Can reports be emailed automatically? What is the catch?
- Can you prevent people from seeing sensitive info in a report?
Dashboards

- Display report data as graphs and charts
  - Gauges
  - Line/bar graphs
  - Pie/donut charts
- Display at-a-glance ‘real-time’ metrics
- Use Summary reports and Tabular reports as data source
  - Tabular reports must be limited to < 99 rows
Dashboards and Tabular Reports

• Extra steps required to create a Dashboard from a Tabular Report
  1. Start with a Tabular Report
  2. Add a Row Limit (from Filters > Add)
  3. Modify Dashboard Settings
  4. You can now use the report as a Data Source in a Dashboard
Creating a Dashboard

1. Go to the Reports tab
2. Click ‘New Dashboard’
3. Drag on a component
4. Drag on a data source
5. Click ‘Spanner’ to configure
6. Change titles and descriptions
7. Save in a dashboard folder
Create a Dashboard

1. Create a new dashboard
2. Add a gauge showing total Opp value using your ‘Open Opps by Stage’ report
3. Add a pie chart showing total Opp value by Stage using your ‘Open Opps by Stage’ report
4. Add a bar chart showing Opp value over time using your ‘Open Opps by Close Date and Stage’ report
5. Add relevant titles and descriptions
Next Steps
Now that you’ve mastered Views, Tabular and Summary Reports...

• In our Advanced Reporting Course:
  – Matrix Reports in depth
  – Custom Report Types (required for custom objects and other data relationships)
  – URL hacking of Reports
  – Report Formulas
  – Special Opportunity Reports
This Slide Deck

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• Any questions?