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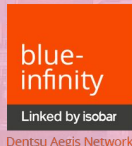
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Barcelona 2018



Advanced Reporting Tips & Tricks for New Admins

Aaron Crear

Founder & Principal Consultant at Hat-Trick Consulting

www.hat-trickconsulting.com, @aaroncrear



Why am I Here?

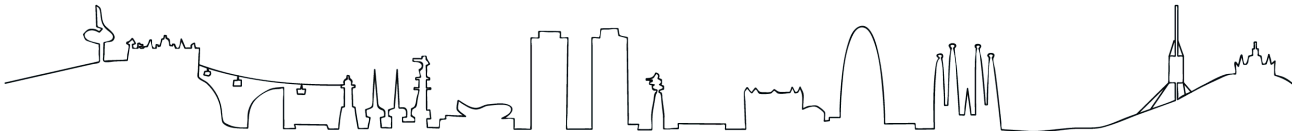
Salesforce Changed My life!

Recovering Sales Manager

- User since 2009
- Began self-learning to make my job easier
- Became default Salesforce Admin

Rolled the dice in June 2016, accomplishments by April 2018

- Began with Trailhead
- 3 x Salesforce Certified
- Full-time consulting practice with book of clients
- Dreamforce Presenter
- Lowell User Group Leader, Northeast Dreamin' Co-Organizer



Presentation Objectives

Are you a new Admin struggling to create reports for your team? Do you spend way too much time racking your brain trying to get data to present properly? You're not alone. Many beginner Admins spend hours trying to develop reports that should only take minutes to finish. This session will show you real examples of advanced reporting features that will make your job easier and provide greater value to your users.



Overview of Topics

- Cross Filters
- Power of One
- Custom Summary Formulas
- Buckets
- Joined Reports
- Custom Report Types



Cross Filters

- **Cross Filters allow you to filter reports by Objects instead of just Fields**
- **These Object filters are dependent on the Parent Object of the report type**
- **With or without criteria**
- **Remove unwanted results**



Use Case

Cross Filters

As a Sales Rep, all Contacts should have Activities associated with them. You want to make sure you've done this and create a report of all Contacts without Activities to begin outreach.

Report Properties Run Report

Filters Add

Show All accounts

Date Field Created Date Range All Time From To

Accounts without Contacts OK Cancel

L Add Contacts Filter



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REPORT NAME	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Sales to Goal		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Accounts with Opps by Industry		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Sales - Month, Year, 12 Mos		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Activity Volume - Oct Newsletter		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Sales by Region		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Opportunity Pipeline Composition		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Contacts without Activities		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>

javascript:void(0);

Power of One

- **Allows you to summarize and count Objects in reports**
- **A new Custom Formula Field**
- **Do it on every Object**
- **Name the Field the same as the Object**



Use Case

Power of One

The Sales Director wants a report that shows the Pipeline summary by Stage that breaks down the number of Opportunities, Accounts and Products.

Edit Account Custom Field
Accounts

Custom Field Definition Edit Save Quick Save Cancel

Field Information

Field Label

Field Name

Description

Help Text

Formula Options

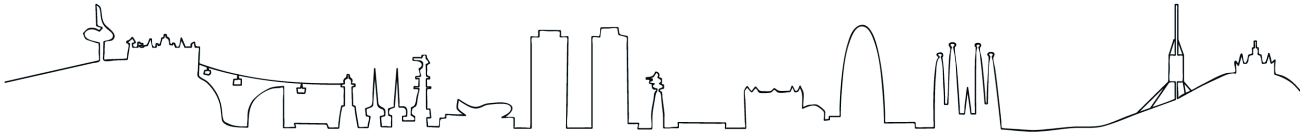
Formula Return Type

Decimal Places

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: `Fahrenheit = 1.8 * Celsius_c + 32` [More Examples...](#)

Select Field Type Insert Field

Accounts (Number) =



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Custom Summary Formulas

- **Used to calculate additional totals in Summary, Matrix and Joined reports**
- **Based on numeric Fields, which can be summarized**
- **Can be used with expressions, fields and values**
- **They are unique to the report and cannot be shared to other reports**



Use Case

Custom Summary Formulas

You want to give the sales team a visual representation of where their sales are compared to goal.

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'Percentage to Monthly Goal'. The 'Format' is 'Percent' and 'Decimal Places' is '2'. The 'Where will this formula be displayed?' section shows a grid with a selection arrow pointing to a specific row/column grouping level. The 'Formula' section contains the formula 'AMOUNT.SUM / 500000'. The 'Functions' section shows the 'ABS' function selected, with a description: 'Returns the absolute value of a number, a number without its sign'. The 'OK' and 'Cancel' buttons are at the bottom.

Custom Summary Formula [Help for this Page](#)

Column Name: Percentage to Monthly Goal

Description:

Format: Percent Decimal Places: 2

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

☐ At all summary levels

☒ At a specific row/column grouping level...

A Close Month (by Day)

B Column Grand Summary

Formula Functions [Tips](#)

Summary Fields Operators Check Syntax

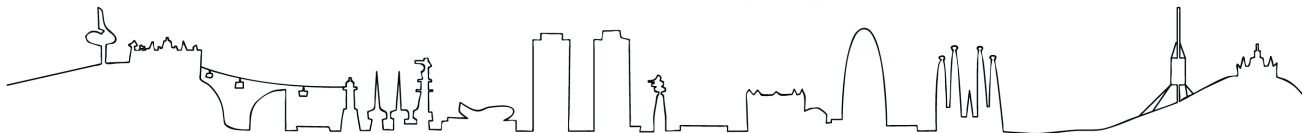
AMOUNT.SUM / 500000

ABS(number)

Returns the absolute value of a number, a number without its sign

< Insert [Help on this function](#)

OK Cancel



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Created by Me	Contacts without Activities		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
Private Reports	Sales to Goal		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
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Created by Me	Sales by Region		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> <div>▼</div>
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Buckets

- **Allow you to categorize a group of values**
- **Use custom names for each Bucket**
- **Does not require Formulas or Custom Fields**
- **Think of Opportunity Stage Forecast Categories**



Use Case

Buckets

You are tasked with creating a sales by region report. Opportunities from Accounts in the US and Canada should be combined into “NA” and all of countries in Europe should be combined into “Europe”.

Edit Bucket Field

Use bucket fields to group, filter, or arrange report data. Create multiple buckets in this bucket field to group your report records.

Source Column: Billing Country

Bucket Field Name: Region

New Bucket

Search for Values

Enter Values

Bucketed Values(2)

- NA (1)
- Europe (1)

Search for Billing Country values that you'd like to bucket.

☒ Show unbucketed values as "Other."

OK Cancel

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Joined Reports

- **Allow you to view different types of information within a single report**
- **Create up to 5 Blocks**
- **Requires Report Builder Permission**
- **Not yet available in Lightning**



Use Case

Joined Reports

The Sales Director would like one report that shows sales for month, YTD and Last 12 months.

Report Type: Opportunities
Sales - Month, Year, 12 Mos

Save Save As Close Report Properties Add Report Type Run Report

Fields All #

Quick Find

Drag and drop to add fields to the report.

Formulas

- Add Formula
- Add Cross Block Formula

Opportunity Information

- Created By
- Created Alias
- Last Modified By
- Last Modified Alias
- Opportunity Name
- Type
- Lead Source
- Primary Partner
- # Amount
- # Opportunity Quantity
- # Expected Revenue

Month Add

Show All opportunities Opportunity Status Closed Wor Probability All

Date Field Close Date Range This Month From 10/1/2017 To 10/31/2017

To add filters, click Add.

This Year Add

Show All opportunities Opportunity Status Closed Wor Probability All

Preview Joined Format Show Add Chart

	OPPORTUNITIES Month	OPPORTUNITIES This Year	OPPORTUNITIES Last 12 Months			
	Record Count	Amount	Record Count	Amount	Record Count	Amount
Drop a field here to group across report blocks.						
Grand Totals	1	\$50,000.00	17	\$3,595,000.00	18	\$3,645,000.00

This preview shows a limited number of records. Run the report to see all results.



New Report New Folder

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Recent	Sales by Region		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> 
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Created by Me	Activity Volume - Oct Newsletter		Dreamforce 2017	Aaron Crear	<input type="checkbox"/> 

Custom Report Types

- **Allow you to create more complex Reports not provided by Standard Reports**
- **Include up to 4 Objects**
- **Primary Object and secondary Objects, which must be related to the Primary**
- **Choose whether secondary Object may or may not have an associated Record**
- **Select which Fields from the Objects are available on the Report Type**

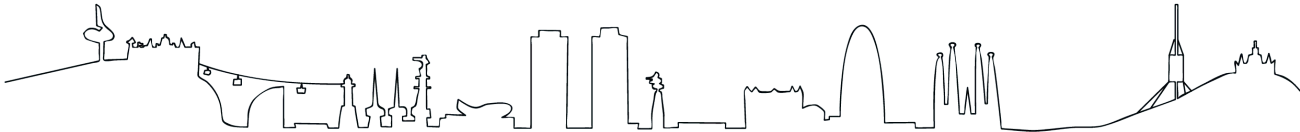


Use Case

Custom Report Types

The marketing manager would like to see what activity volume Campaigns are driving with the visibility to the Contact level.

The screenshot shows the 'Setup Report Types' interface in Salesforce. The title is 'Edit Custom Report Type: Campaign Activity - Contacts'. A yellow warning banner states: 'Changes you make to this report type will affect existing reports created from it. We recommend that you clone any report type you wish to edit, rather than change a working report type.' Below this is the 'Object Relationships' section with 'Save' and 'Cancel' buttons. A descriptive text says: 'This report type will generate reports about Campaigns. You may define which related records from other objects are returned in report results by choosing a relationship to another object.' The interface shows three objects: 'A Campaigns' (Primary Object), 'B Contacts', and 'C Activities'. A Venn diagram illustrates the relationships between these objects. Below the diagram, there are two relationship configuration boxes. The first box, 'A to B Relationship', has two radio buttons: 'Each "A" record must have at least one related "B" record.' (selected) and 'A "A" records may or may not have related "B" records.' The second box, 'B to C Relationship', also has two radio buttons: 'Each "B" record must have at least one related "C" record.' (selected) and 'B "B" records may or may not have related "C" records.' A yellow message box at the bottom states: 'The selected object has no further relatable objects. [More Info](#)'. At the bottom of the interface are 'Save' and 'Cancel' buttons.



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Conclusion

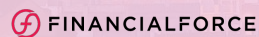
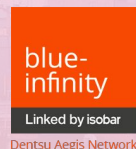
- Better business insights to your organization
- Help drive decision making
- Understanding and visualizing data simpler
- Add more value for users
- Make your job easier!



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Thank You



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