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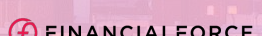

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Barcelona 2018

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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?

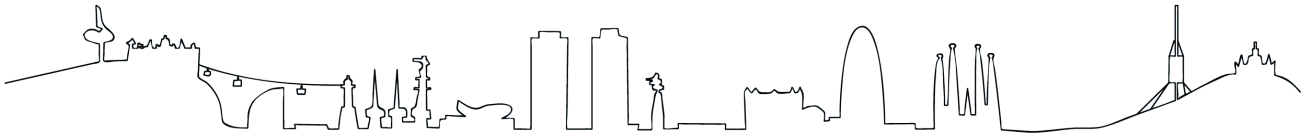
Salesforce Changed My life!

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

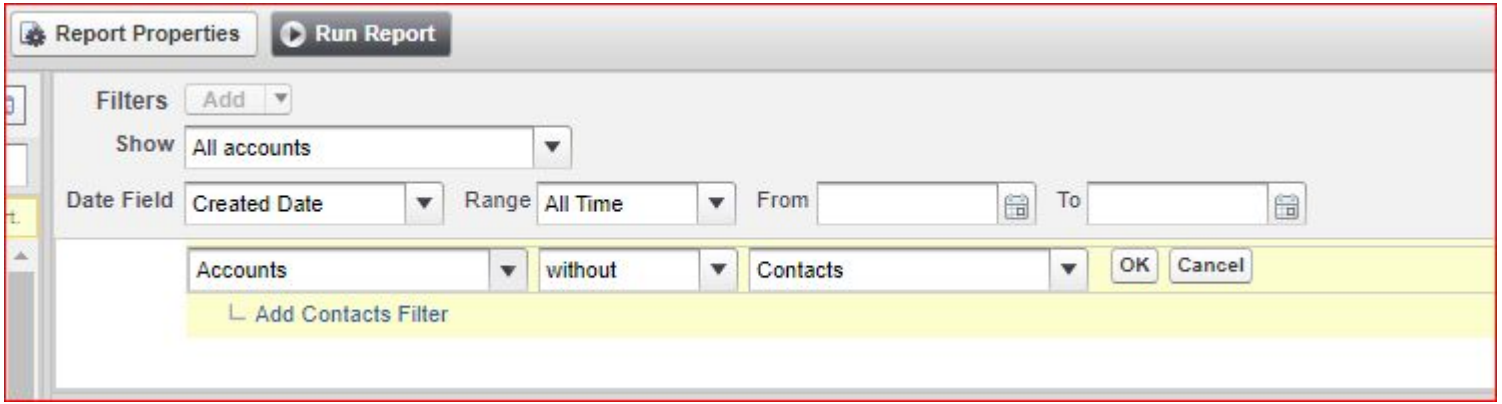
Cross Filters

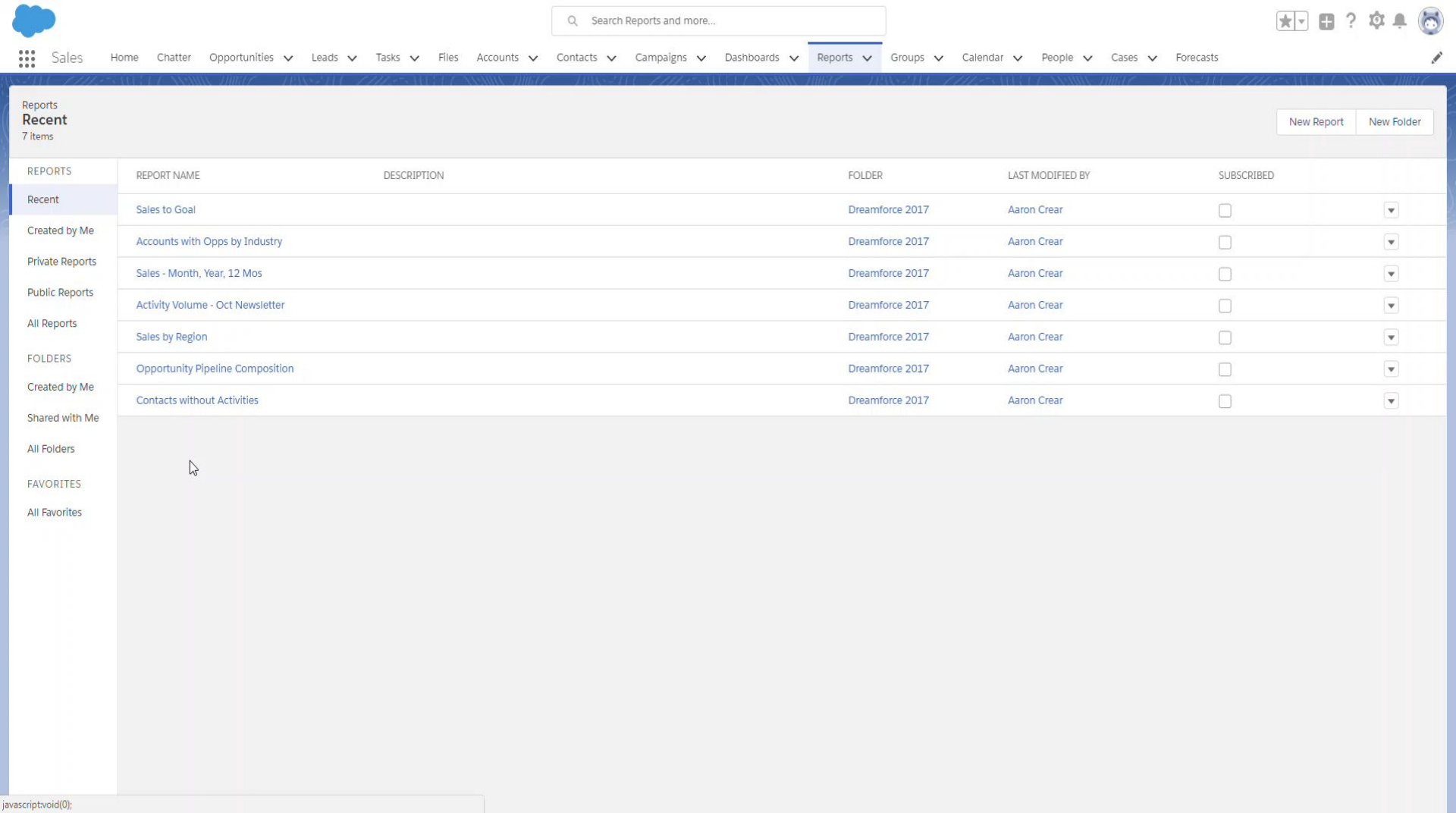
- **Cross Filters allow you to filter reports by Objects instead of just Fields**
- **These Object filters are dependent on the Parent Object of the report type**
- **With or without criteria**
- **Remove unwanted results**

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.

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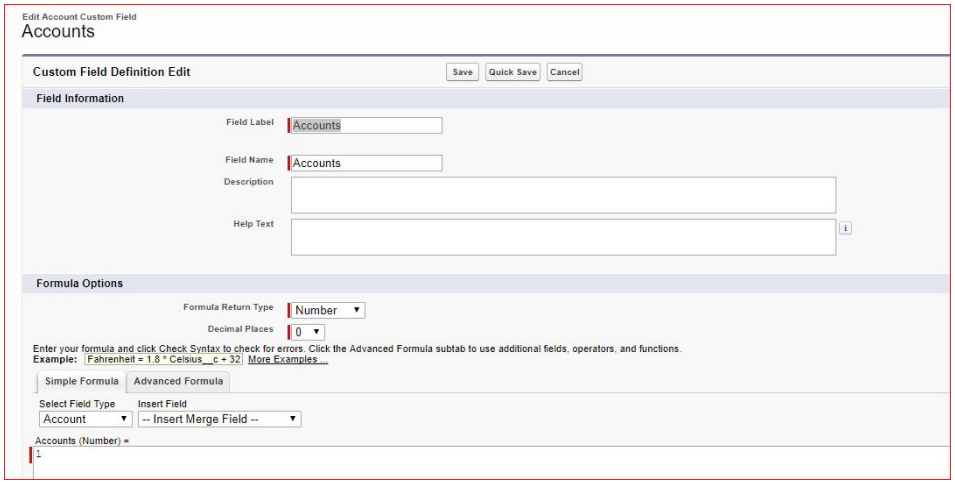
Power of One

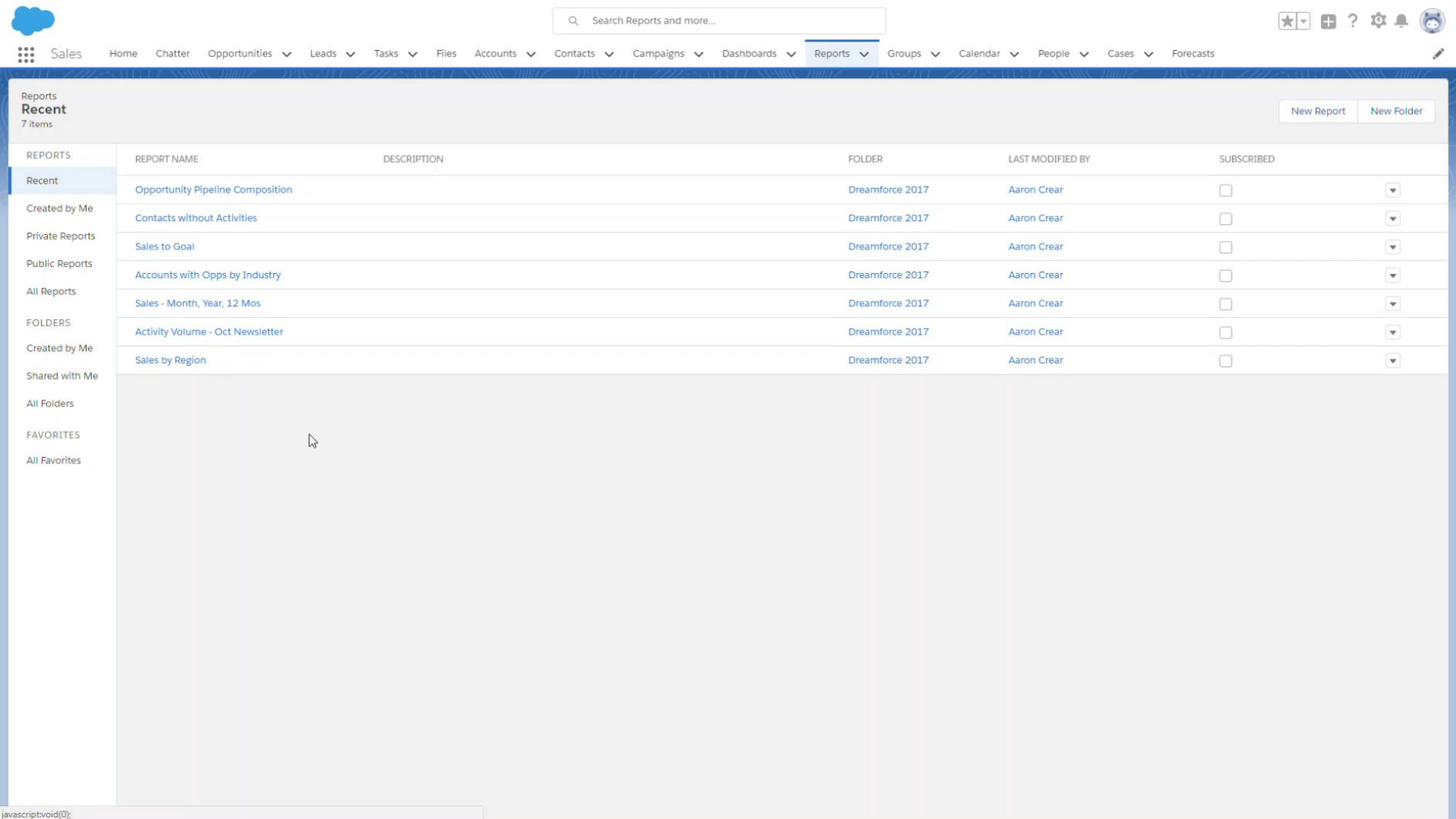
- Allows you to summarize and count Objects in reports
- A new Custom Formula Field
- Do it on every Object
- Name the Field the same as the Object

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.

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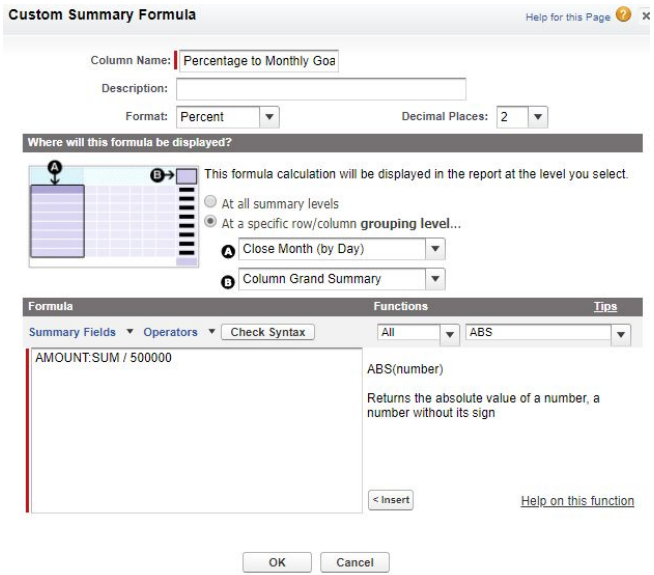
Custom Summary Formulas

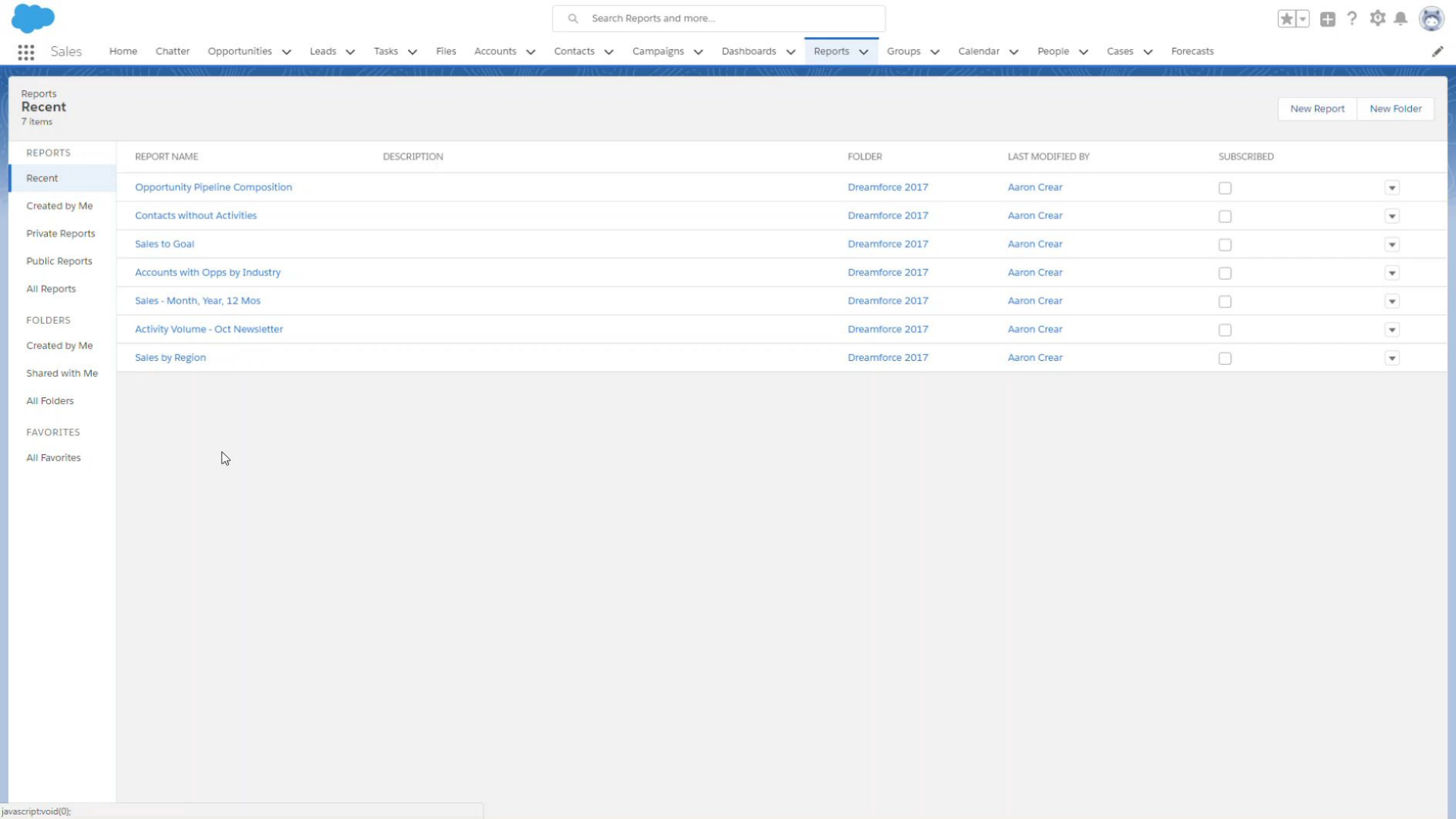
- Used to calculate additional totals in Summary, Matrix and Joined reports
- Based on numeric Fields, which can be summarized
- Can be used with expressions, fields and values
- They are unique to the report and cannot be shared to other reports

Use Case

Custom Summary Formulas

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

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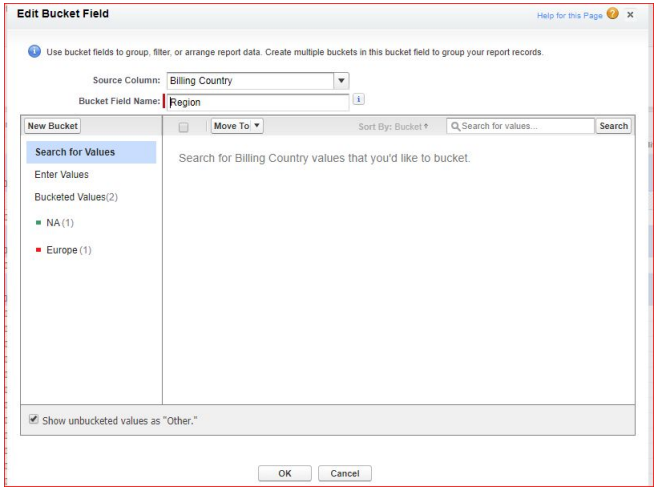
Buckets

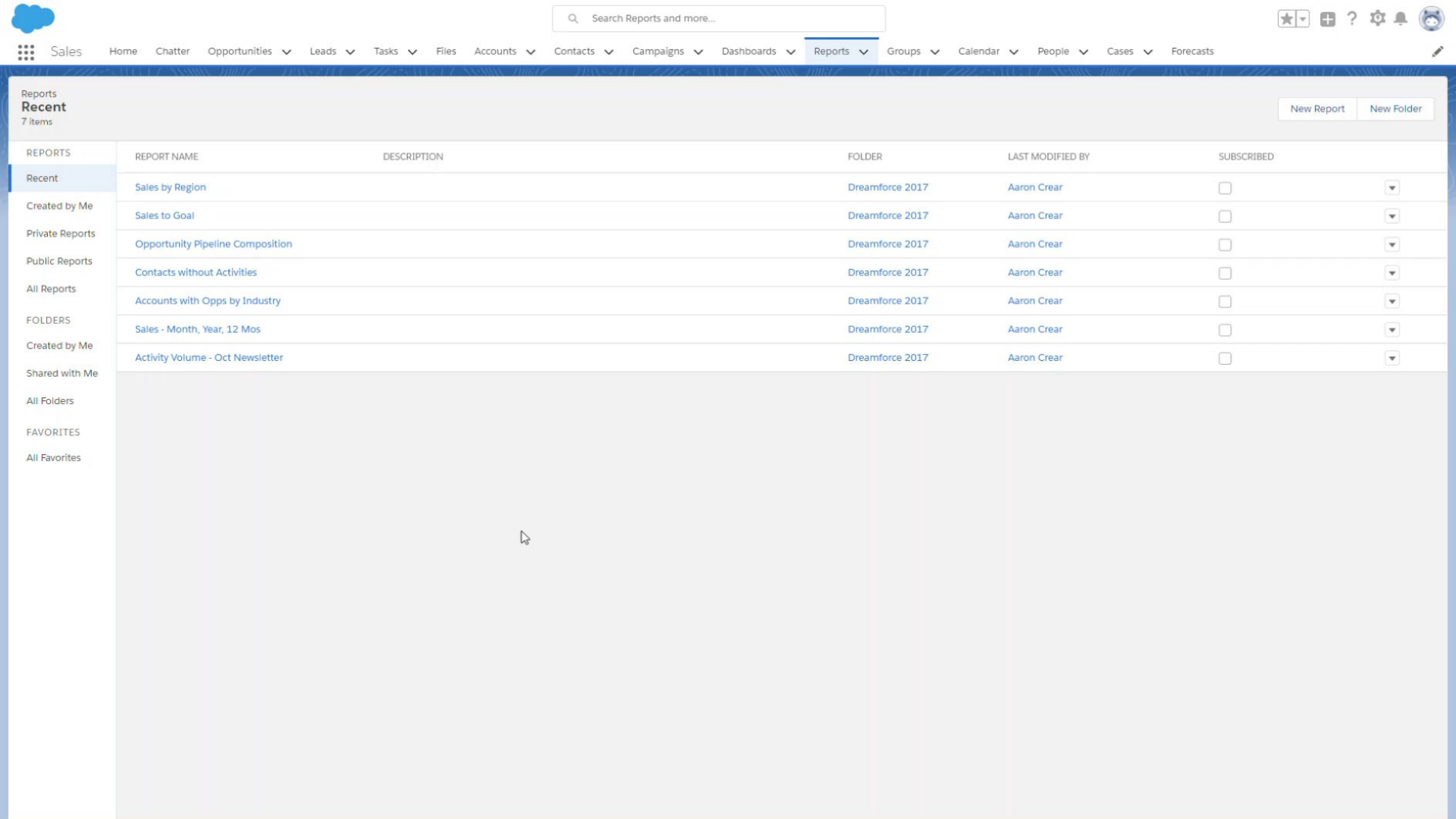
- Allow you to categorize a group of values
- Use custom names for each Bucket
- Does not require Formulas or Custom Fields
- Think of Opportunity Stage Forecast Categories

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”.

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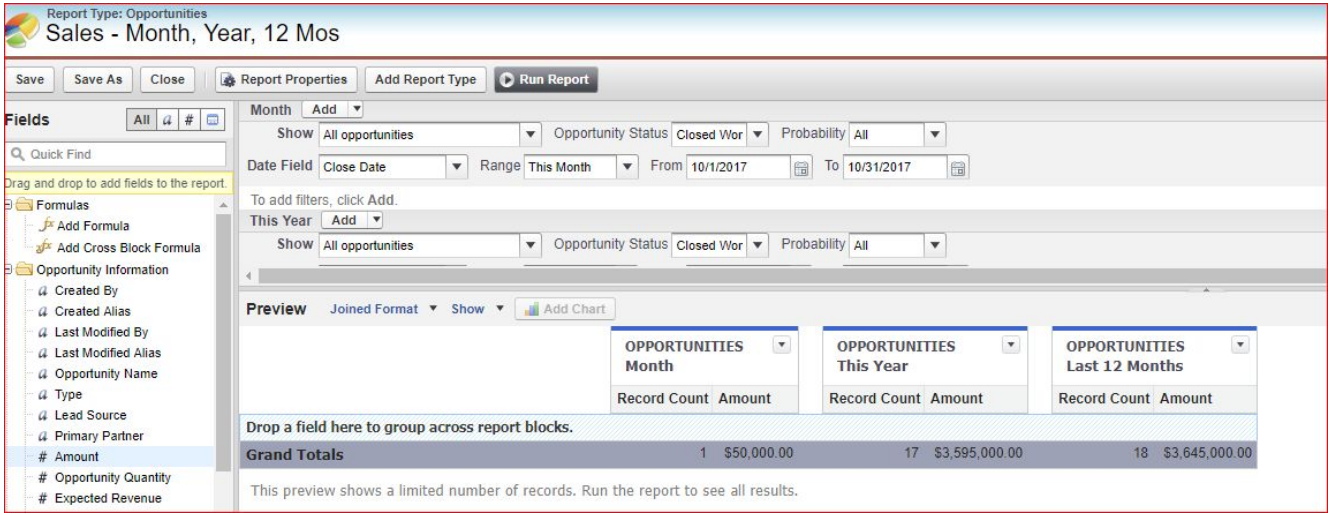
Joined Reports

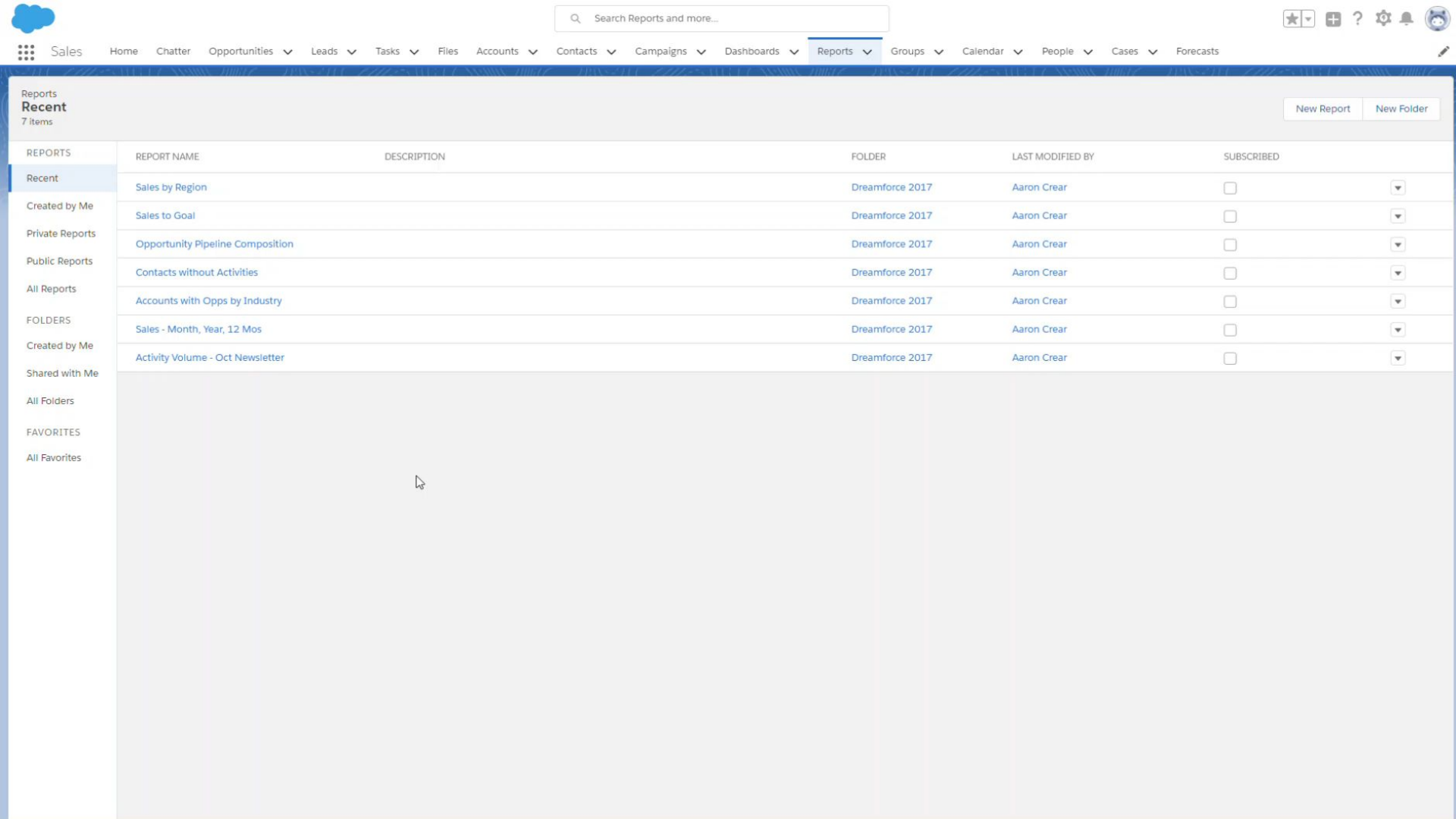
- **Allow you to view different types of information within a single report**
- **Create up to 5 Blocks**
- **Requires Report Builder Permission**
- **Not yet available in Lightning**

Use Case

Joined Reports

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

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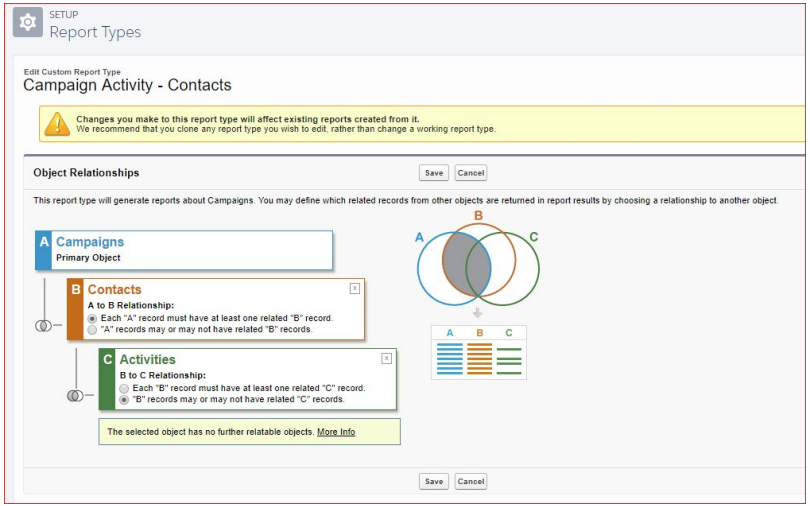
Custom Report Types

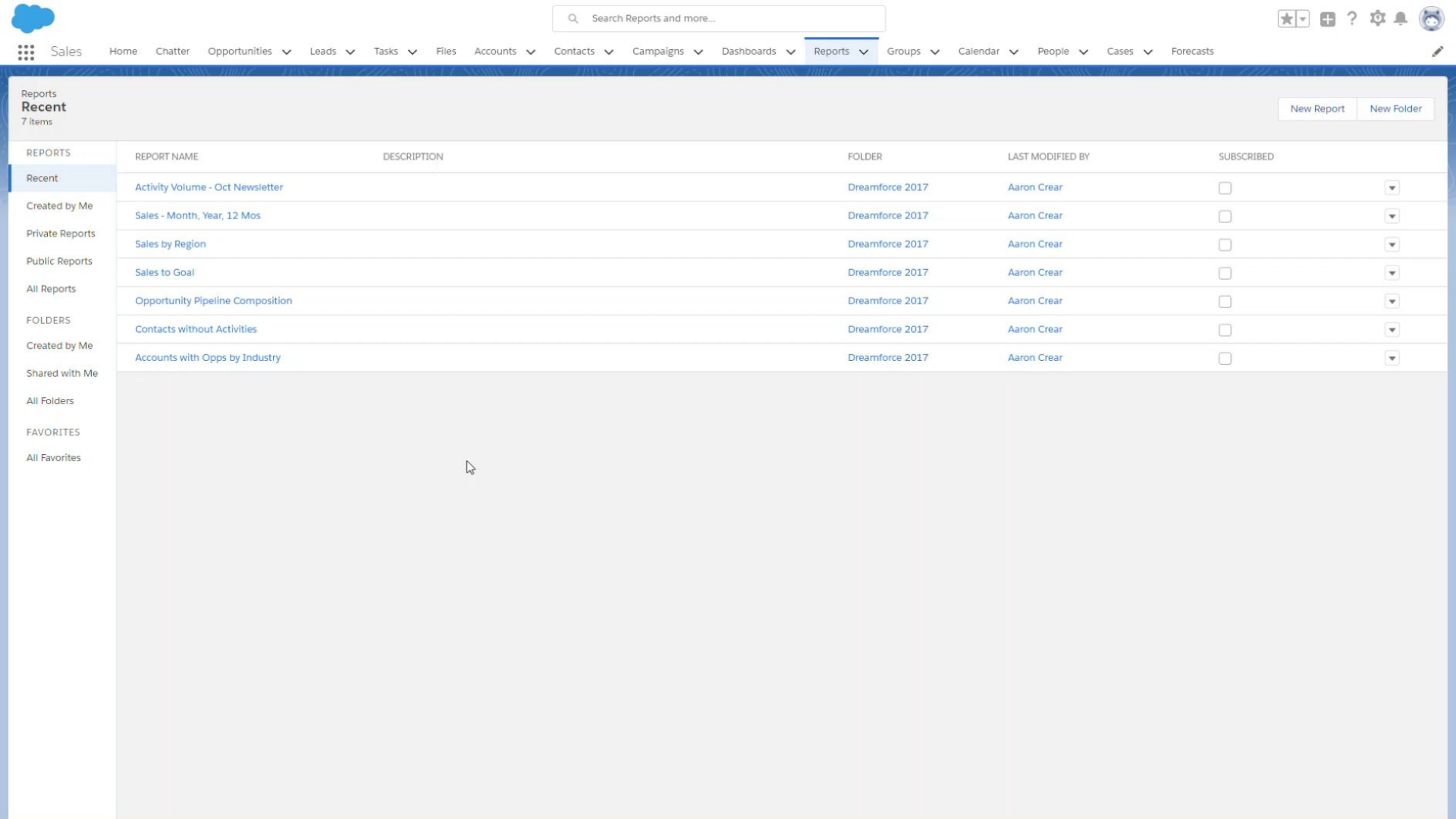
- **Allow you to create more complex Reports not provided by Standard Reports**
- **Include up to 4 Objects**
- **Primary Object and secondary Objects, which must be related to the Primary**
- **Choose whether secondary Object may or may not have an associated Record**
- **Select which Fields from the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

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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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