Better healthcare, realized.

Salesforce General Navigation Training

05/30/2025

What will be covered in this training?

- Part 1: Welcome to Salesforce
- Part 2: Initial Login and Navigation
- Part 3: Salesforce Object: Accounts, Contacts, & Cases
- Part 4: Leveraging List Views
- Part 5: Using Activities and Workplans
- Part 6: Reports and Dashboards

This training will help you complete the following objectives:

- Understand what Salesforce is and how it can help you be efficient in managing your daily tasks
- Logging into Salesforce and accessing your departments Salesforce App
- Learn how Salesforce organizes data and terminology specific to the organization
- Navigating around key areas of the Salesforce system
- Understanding Account Types, Subtypes and Designations
- Establishing relationships between contacts and one or many facilities
- Using list views to get to important information quickly
- Capture emails, calls and tasks using Salesforce Activities
- Creating reports and dashboards

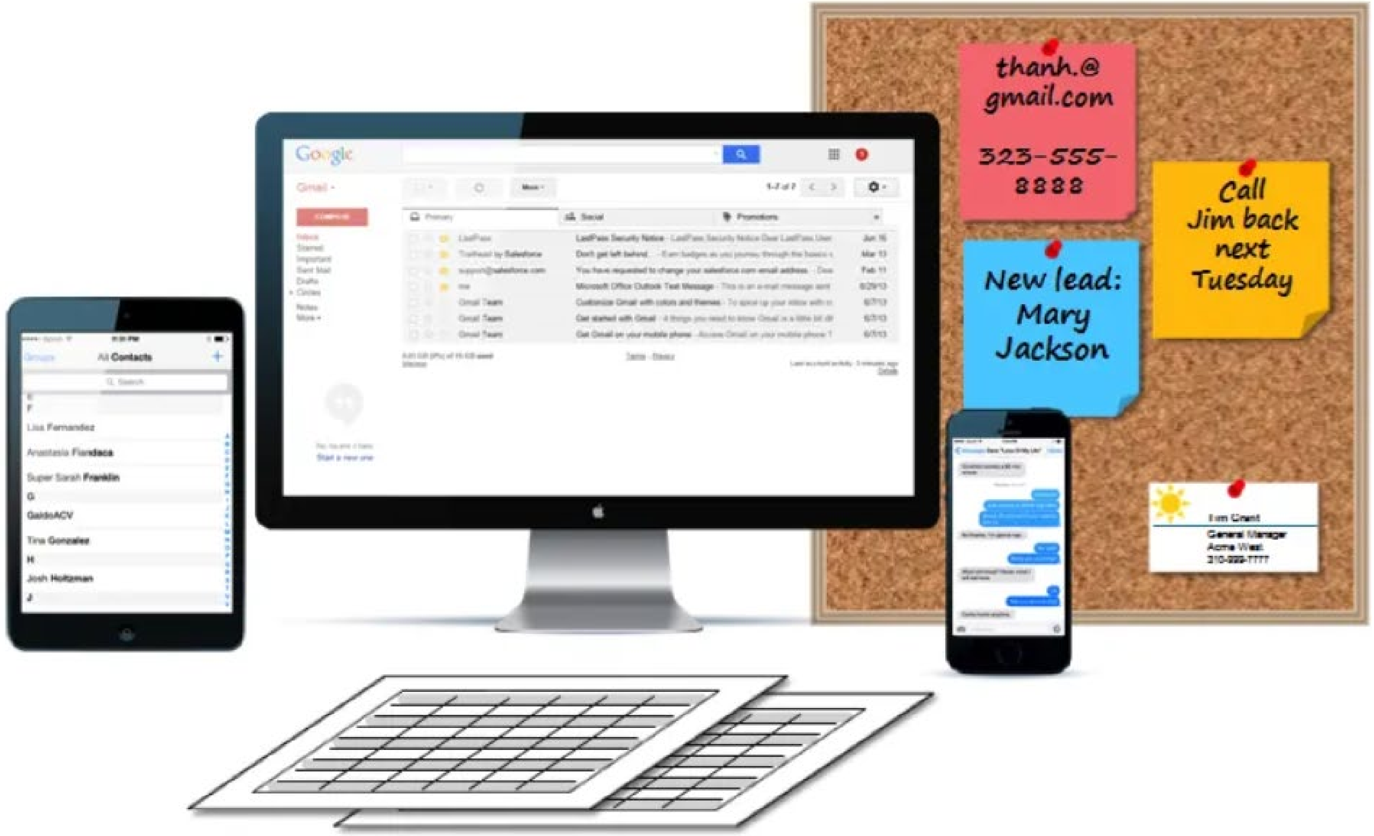
Part 1:
Welcome to Salesforce

Salesforce: Customer Success Platform

- Designed to help you:
  - Complete activities
  - Share information
  - Analyze data
  - Connect with your facilities

- Features assist with:
  - Managing relationships with healthcare providers and contacts
  - Collaborating with others on your team
  - Collaborating and engaging partners
  - Storing your data securely in the cloud

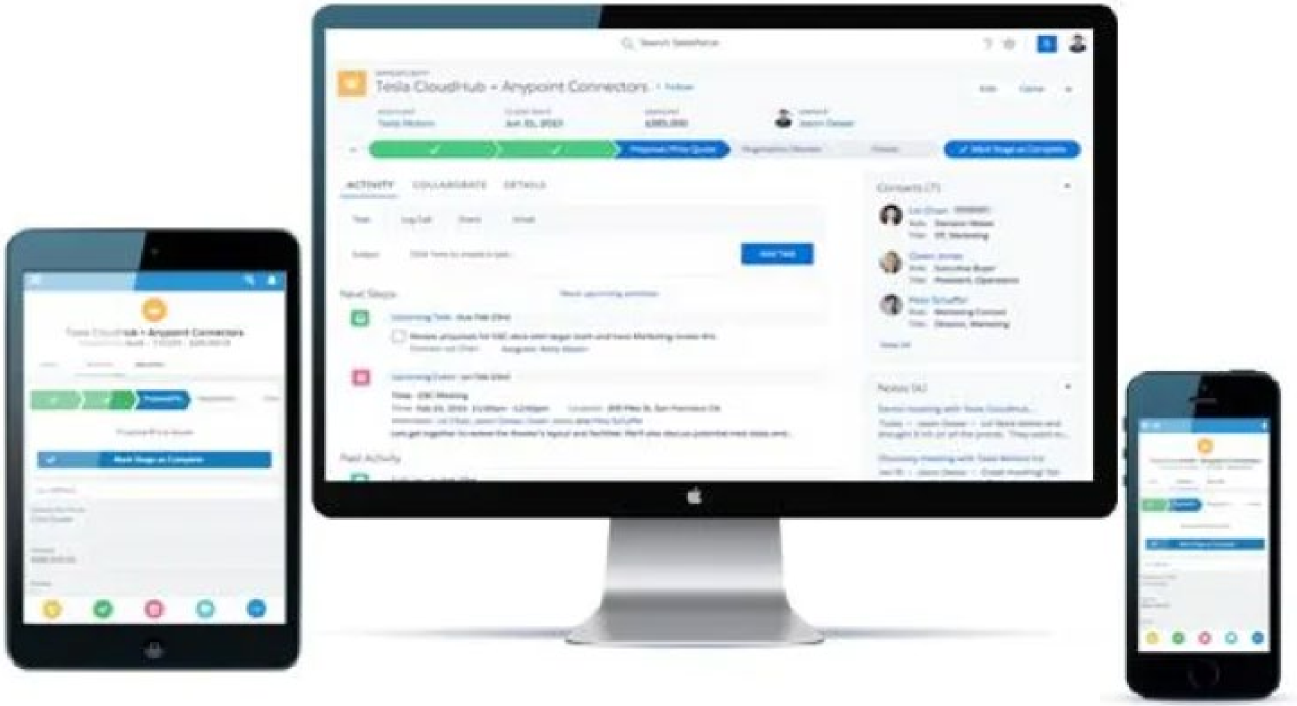
So what does that really mean?
Before Salesforce, your contacts, emails, follow-up tasks, and prospective contracts might have been organized something like this:



Salesforce: Simplifies important data in one place

- Organizing important data in a single place to:
  - Manage all your contacts
  - Work with your customers
  - Organize tasks and to-do items
  - Focus on the right success drivers
  - Collaborate with your team
- Access data anytime, anywhere, on any device
- Management can receive real time updates to assist in decision making

After Salesforce



Data Visibility: Who Sees What?

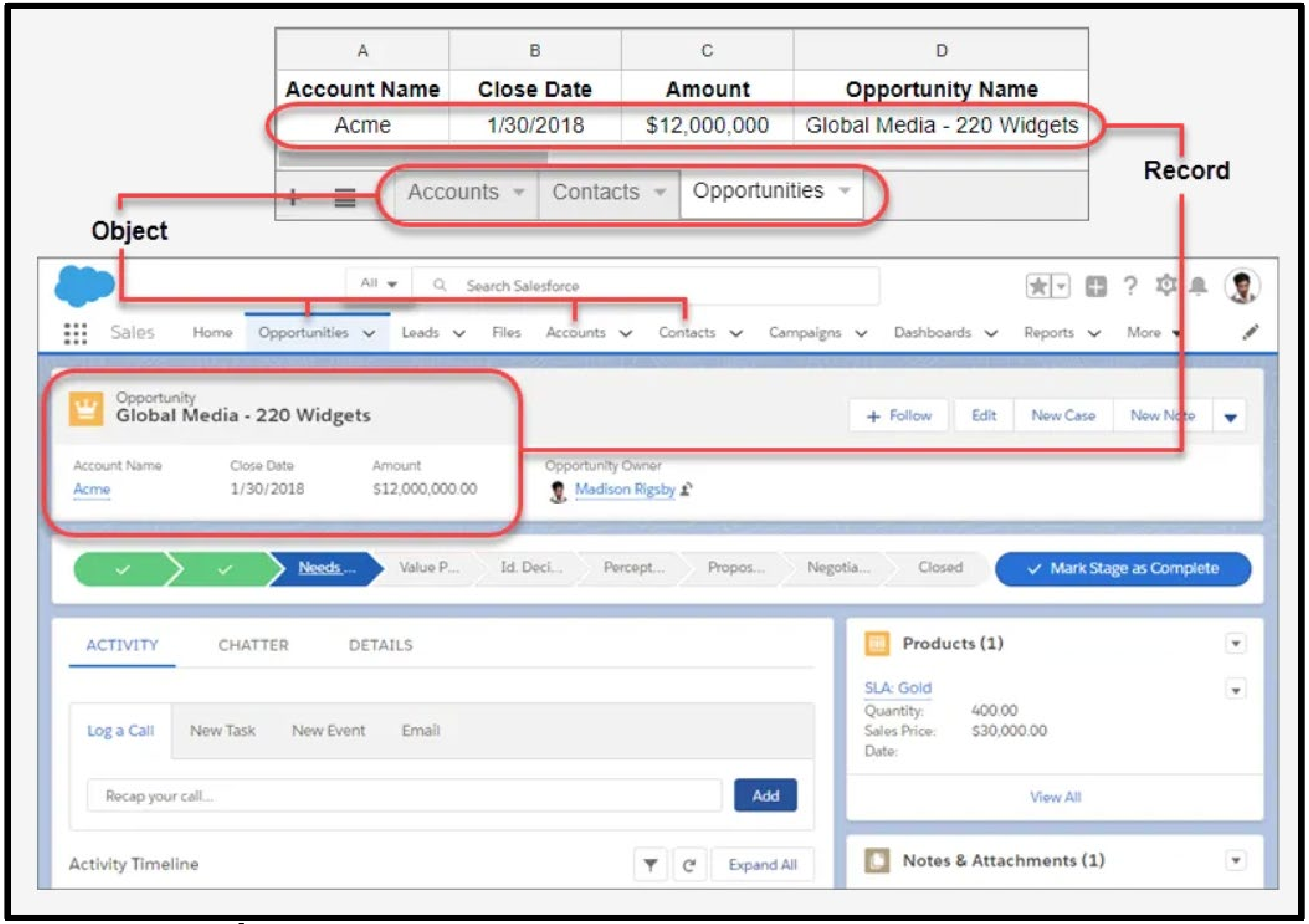
- Protects sensitive data through permissions to ensure the right people see the right data
- Access determines your ability to open and interact with data stored in Salesforce
- The data you can create, view, edit, and delete is determined by permissions
- With the right security enabled, everyone at IPRO can use Salesforce to harness the power of collaboration

Salesforce is a Customer Relationship Management (CRM) Platform

- Allows you to manage relationships across the healthcare continuum and track data related to your interactions
- Helps teams collaborate internally and externally to gather insights across contract areas, track important metrics, and communicate via phone and email
- Supports managing and accessing data in sophisticated ways that you could never do with just one spreadsheet
- Records can be linked together to show how your data is related, so you can see the whole picture

How does Salesforce Organize Data?

Salesforce organizes your data into objects and records.



Objects

- Like a tab on a spreadsheet
- Accessed via the navigation menu

Records

- Like a single row of data
- Select any record to drill into a specific account, contact or other type of record

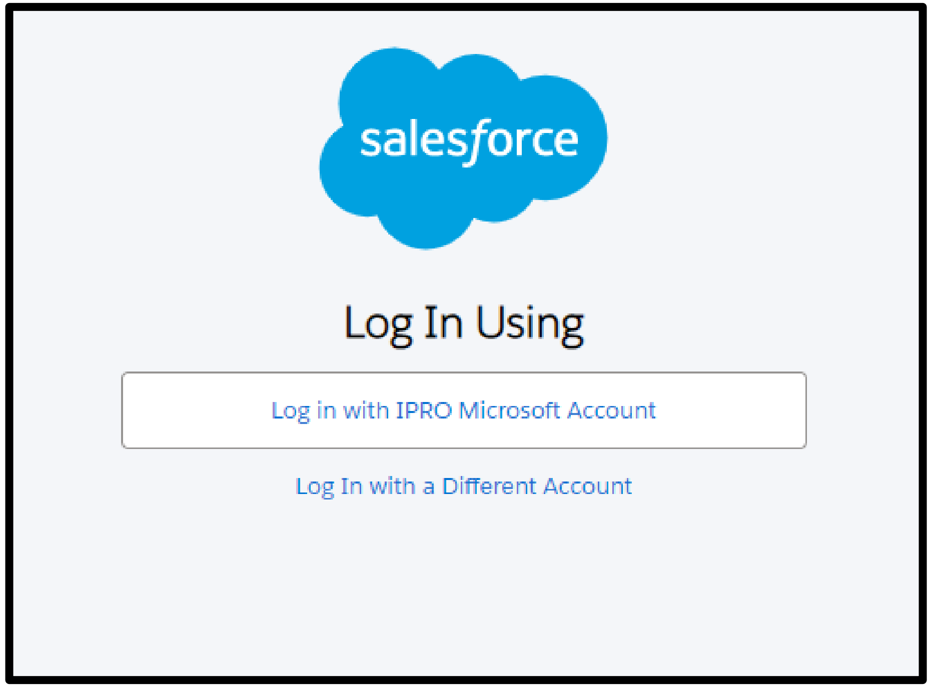
Object, Record, and Other Terms to Know!

When we say	We mean this	Not this
Record	An item you are tracking in your database; if your data is like a spreadsheet, then a record is a row on the spreadsheet	This round thing that plays music #vinyl
Field	A place where you store a value, like a name or address; using our spreadsheet example, a field would be a column on the spreadsheet	A green meadow with flowers and grass and hopping bunnies
Object	A table in the database; in that spreadsheet example, an object is a tab on the spreadsheet	Something unidentified in the sky, with green creatures inside
Org	Short for "organization," the place where all your data, configuration, and customization lives. You log in to access it. You might also hear this called "your instance of Salesforce"	Short for organ, meaning your heart, liver, kidneys, or possibly a big musical instrument
App	A set of fields, objects, permissions, and functionality to support a business process	A thing you download onto your phone

Part 2: Getting Started: Initial Login and Navigation

Logging into Salesforce

- To log into the IPRO Salesforce environment, open a Chrome browser and go to: https://ipro3.my.salesforce.com/
- Select “Log In with IPRO Microsoft Account” for IPRO direct staff, or choose “Log in with a Different Account” for IPRO contract staff
- You will be taken to the login page where you will need to enter your IPRO email address and password. Depending on if you are in an office or not, you might be asked to authenticate via DUO
- Once your account has been verified, you will be re-directed to the IPRO Salesforce instance



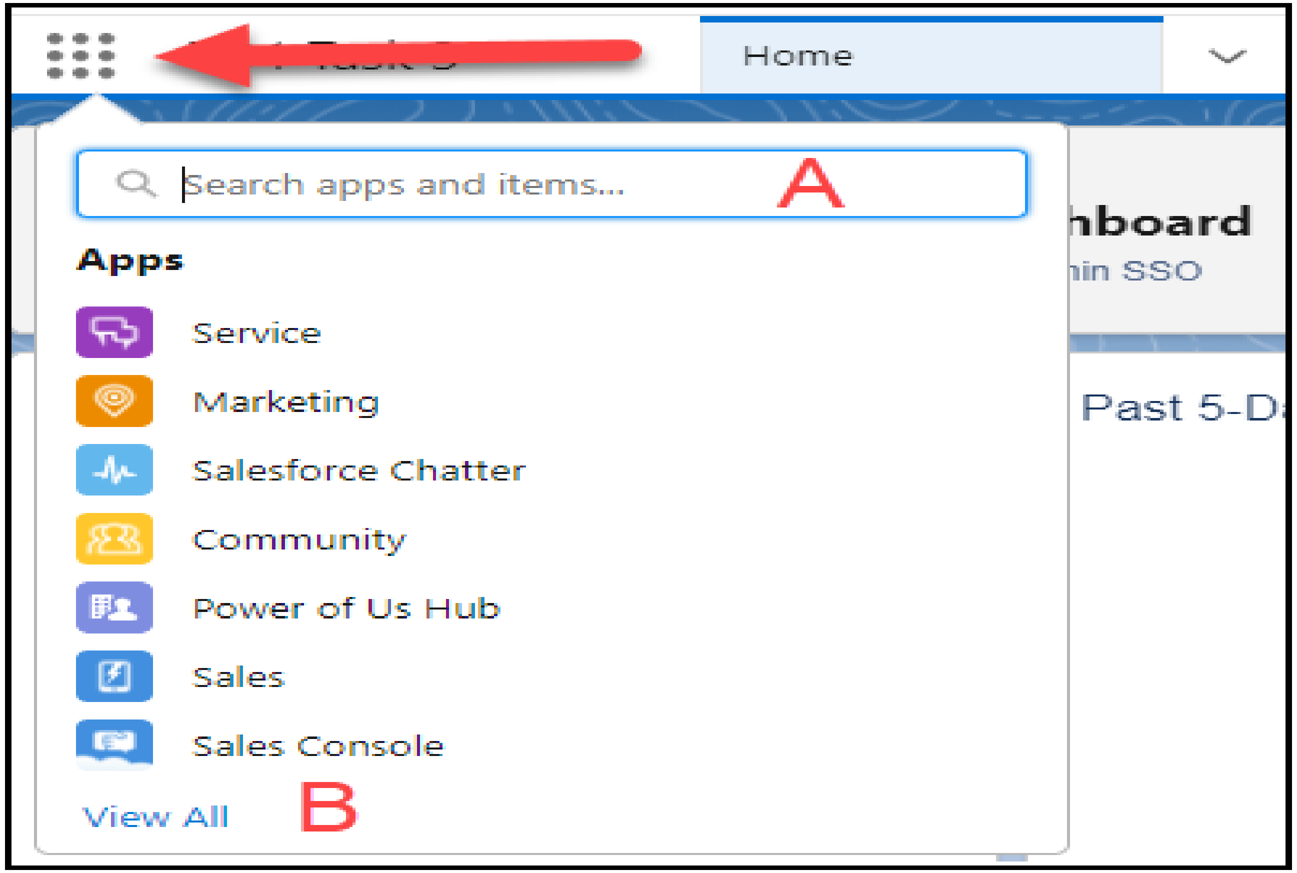
Accessing Departmental Custom App

Each department has been provided with their own App which will contain all the objects that are needed to support the contract.

Click the "waffle icon" or App Launcher icon:

A. Use the "Search apps and items" box to find the app for your department

B. Click "View All" to see a full list of all available applications and objects

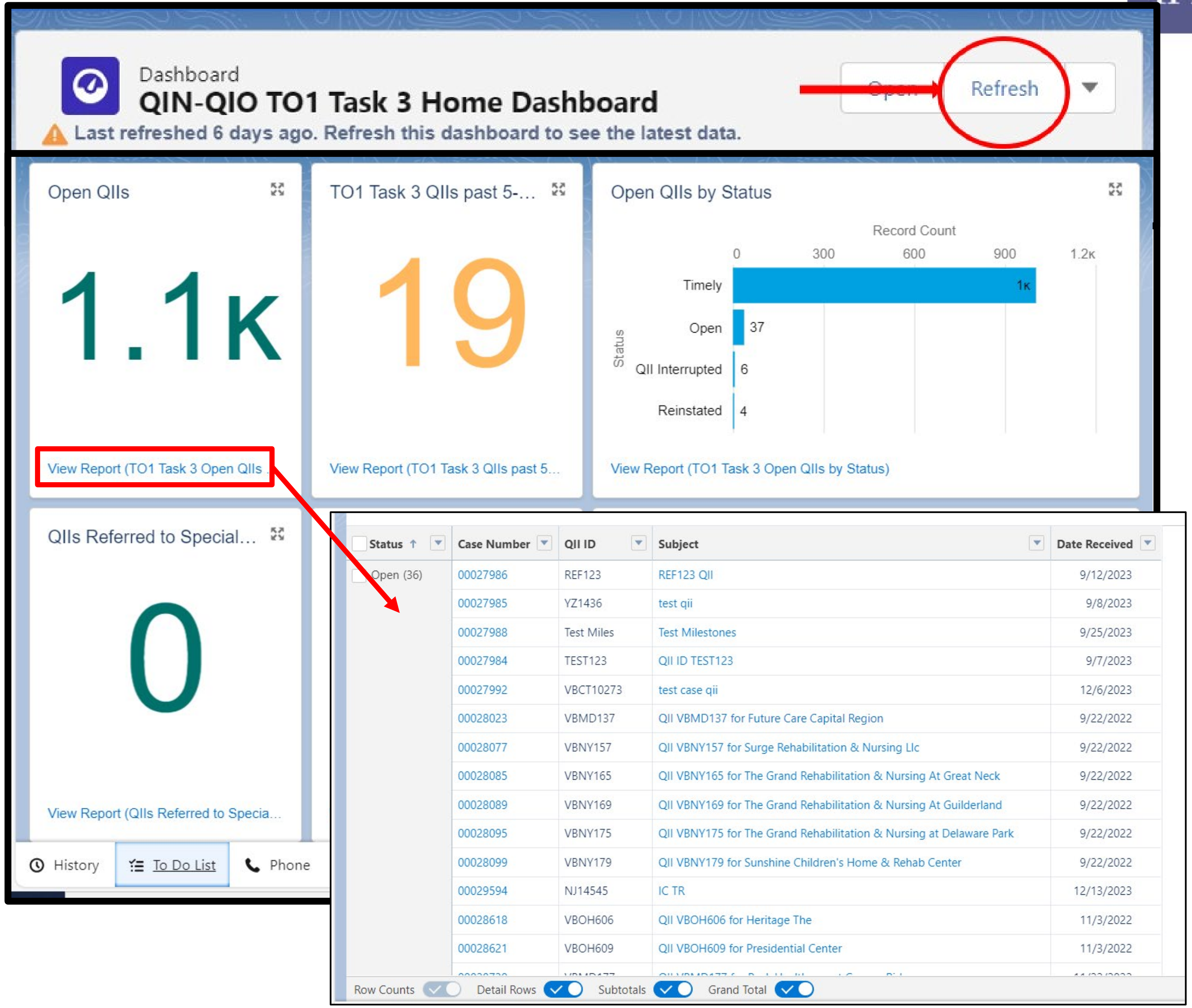


The application selected will display beside the app launcher icon.

Home Page – Dashboard Overview

The home landing page is a dashboard, created to assist you with finding important information quickly.

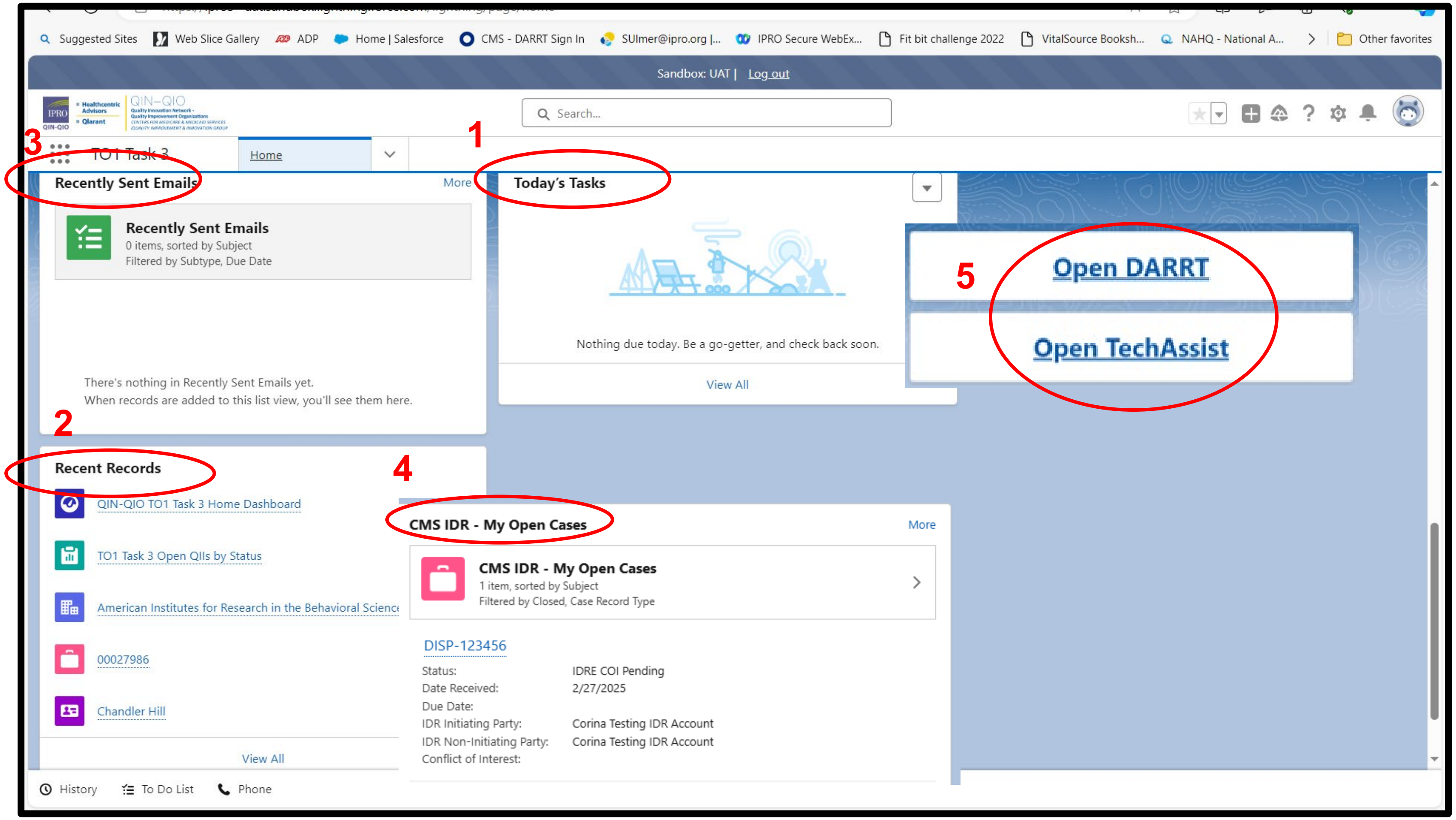
- Home Dashboards are created from a variety of reports for each specific app
- The reports underlying each section can be accessed by clicking the blue “View Report…” link.
- Using the refresh button on the top right will provide real time updated information



Home Page – Dashboard Overview

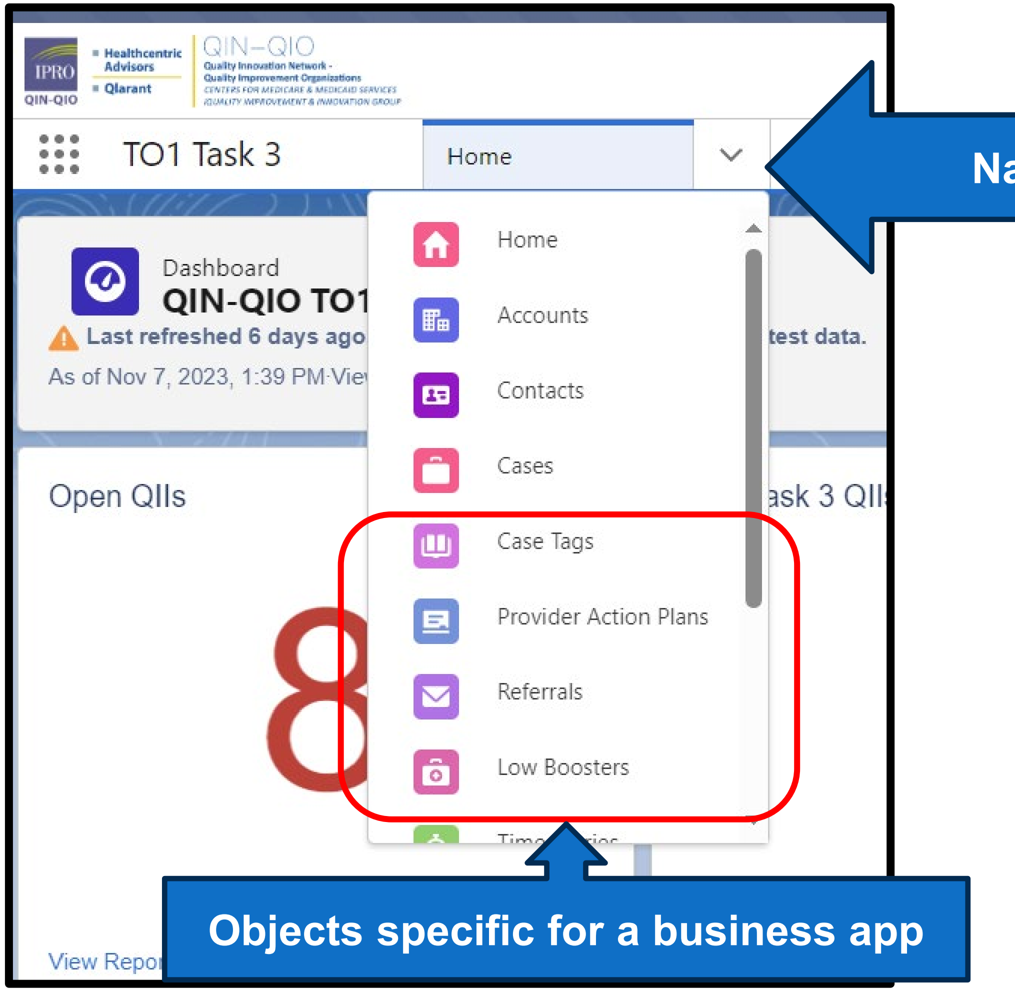
Each Department Home Page is customized for their unique needs. Some helpful information you may find includes:

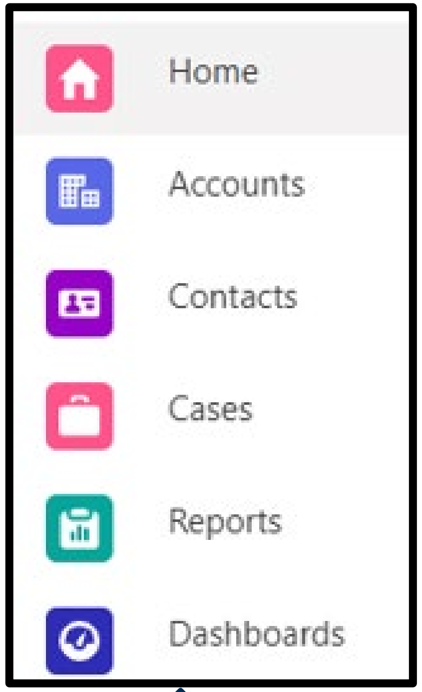
1. Tasks: By using the dropdown arrow next to "today's tasks" you can switch the view from Today's Tasks, My Tasks (future tasks), and Overdue Tasks
2. Recent Records: Quick links to a list of your most recently accessed records
3. Recently Sent Emails
4. My Open Cases
5. Important departmental quick links



The Example above is from QIN – your Dashboard will be customized for your department needs.

Navigation Menu





All Apps have these objects

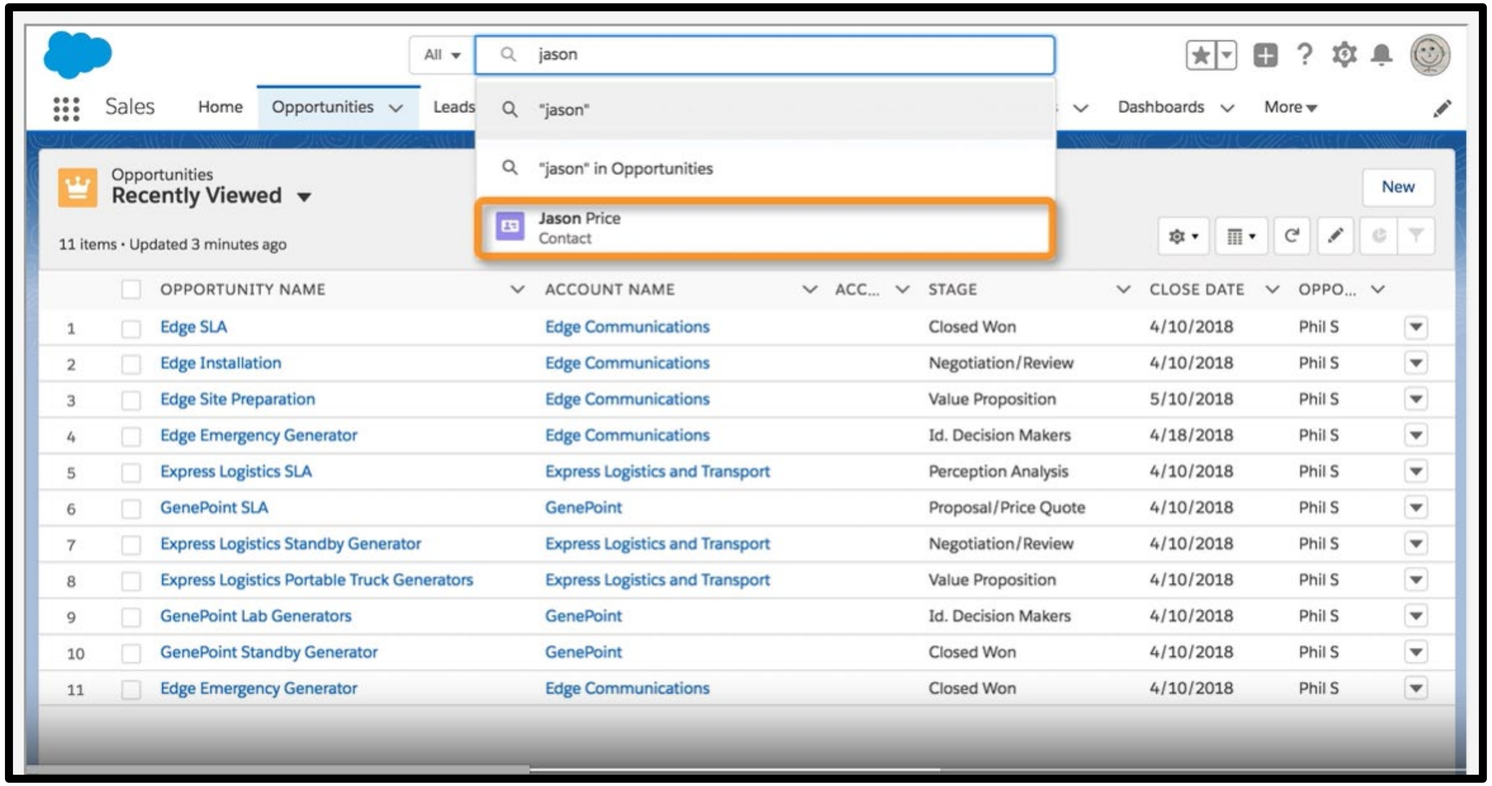
The Navigation Menu is your go to option to switch between Salesforce objects

- Click the arrow to display and access the Salesforce objects availabe for your business app
- IPRO uses a Shared Data model, that means that there are a select set of objects that all departments will use

Searching for Records

At the top of every page is a Global Search option. A Global Search will look through all records containing your search term and bring up all available options.

- Click into the search box which will show you the 5 areas used most frequently
- As you type, suggestions appear in the dropdown list, first by looking at the objects you use most frequently and then looking at the object you are on
- Only 3 characters are needed to start a search, and suggestions appear for what is being searched.
- Clicking on the items searched for will link you directly to that record.



IPRO uses a shared data model for Account and Contact information.

It is a **Best Practice** to **Search First** before creating new records.

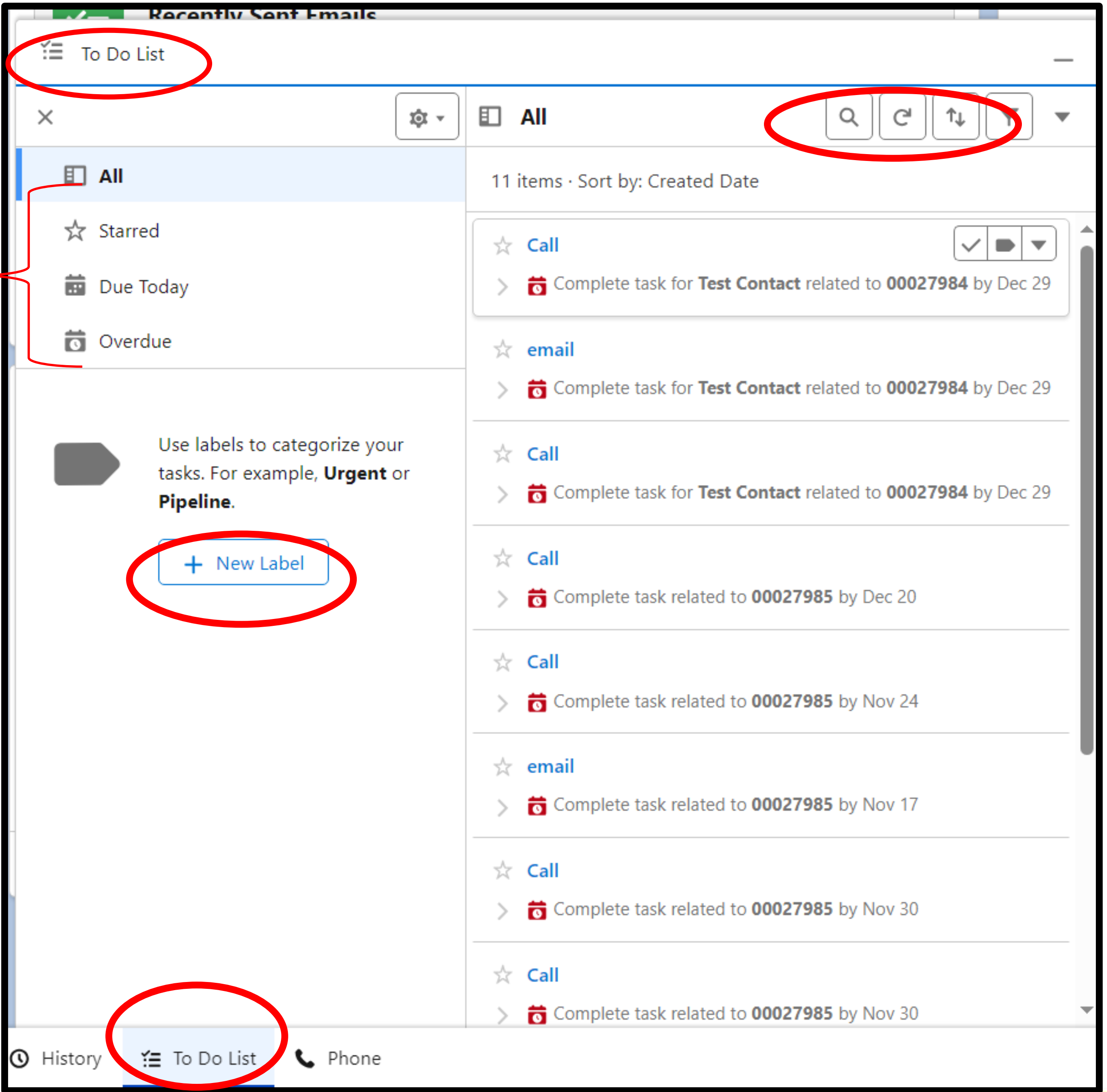
Quick Access Tool Bar

Department Apps may have a bottom tool bar on every Salesforce Page.

This tool bar contains some helpful quick access to tools and information.

- **History** – a listing of recently accessed records
- **To Do List** – activities assigned to you
- **Phone** – the dial pad for RingCentral

Using the “To Do List”



- To Do List allows you to filter items based on how you would like to view your information.
- You can view different categories such as All, Due Today, and Overdue items and even create new labels to categorize tasks.
- There are several icons to the right of the screen that enables you to search the To Do List, refresh the page, sort, and further filter the information.

Part 3: Salesforce Objects: Accounts, Contacts and Cases

Accounts, Contacts, and ACR Objects

Salesforce Object Relationships

- The backbone of all Salesforce data is the Account and Contact objects
- The Account Object represents the "place or building" that is a facility or organization for IPRO contracts
- The Contact Object contains the information of the individual representatives of the Account organization
- IPRO utilizes a Shared Data Model, meaning that departments will share the same Account and Contact records to avoid duplication

Accounts

Salesforce Accounts

Three pieces form the picture of an account

Account Types

Captures information about the type of healthcare provider, organization, or health plan.

Select 1 of these

Examples:

- Facility
- Community Organization
- Government Organization
- Association
- Health Plan
- Health System – links other account types

Account Sub Types

Defines the Account type more granularly. The choices are different depending on the Account Type selected

Select 1 of these

Examples:

- Facility: Hospital, Dialysis Center, etc.
- Community: Faith Based Org, Aging Resources Center, etc.
- Government: Federal, State, Department of Corrections, etc.
- Association: Patient, Professional
- Health Plan: No Sub Types

Designations

Captures information about the type of actions, accreditations, service, location, and/or program associated with an account type

Select 1 or more of these

Examples:

- Acute Care
- Drug Treatment Center
- Rural Emergency Hospital
- Federally Qualified Health Center

Salesforce Accounts

Parent Accounts – Linking Accounts together

Health System Account Types provides the ability to link many account types and sub-types to a centralized entity. This is done through a Parent / Child relationship.

Health System Account Type

Example Use Case:

Fresenius Kidney Care

Create your Health System Account Type First

Then associate other Account Types to the Health System

Fresenius Dialysis Center North Georgia

Account Type: Facility
Account Subtype: Dialysis Center
Designation: Accountable Care Organization

Fresenius Dialysis Center South Georgia

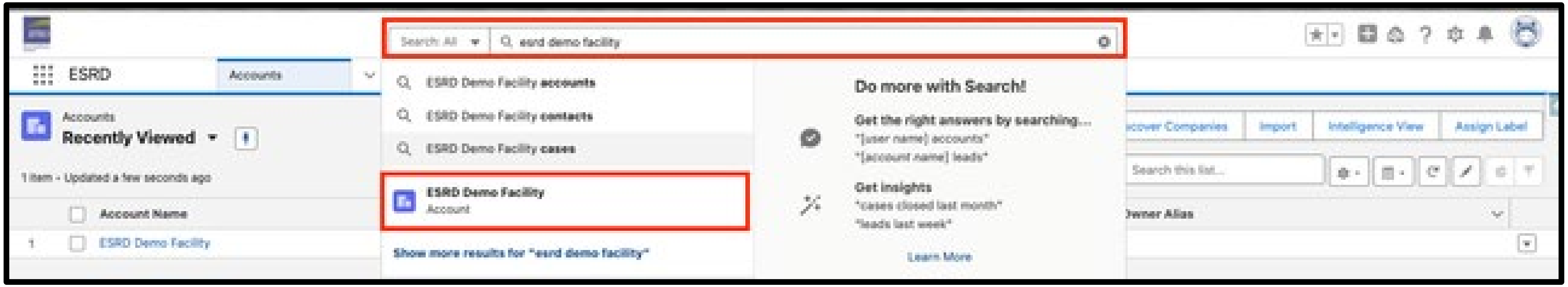
Account Type: Facility
Account Subtype: Dialysis Center
Designation: Accountable Care Organization, Home Dialysis, Nocturnal Shifts,

Fresenius Vascular Access Clinic Atlanta

Account Type: Facility
Account Subtype: Clinic
Designation: Ambulatory Surgical Center

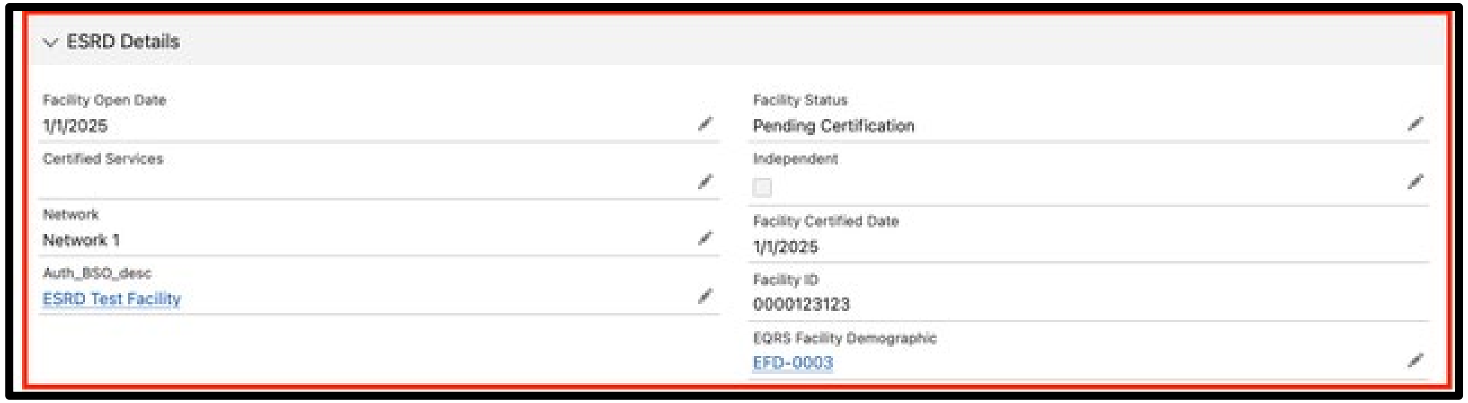
Searching for a Facility or Account

From the top of your screen using Global Search, search for a Facility using Account Name, Doing Business As Name, CCN, NPI or TIN and click on facility.



If your account already exists, you can view the facility details important to your business area.

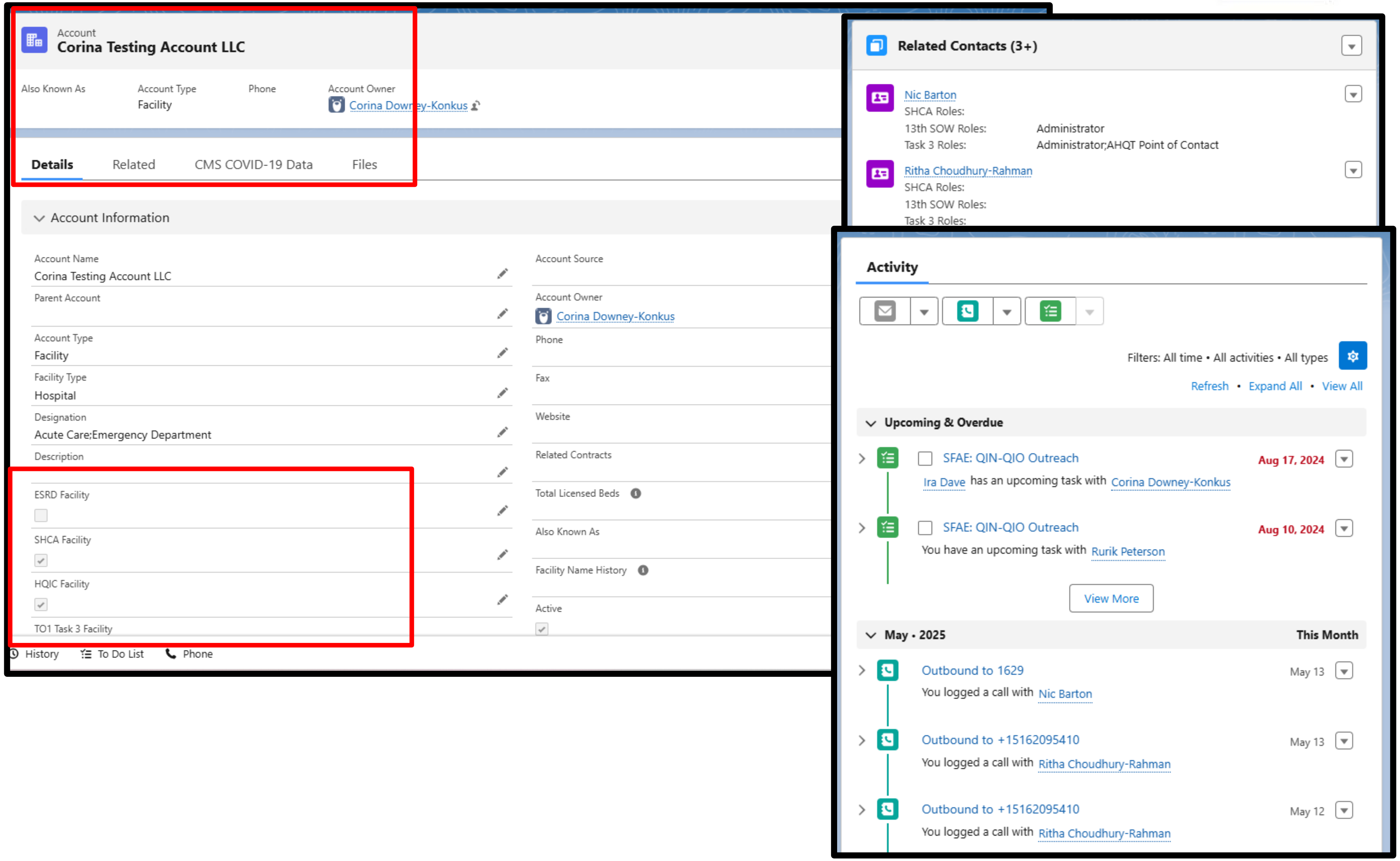
If the account does not exist, follow your department procedure for creating new facilities, health systems, community organizations, or other account types



Account Screen Layout

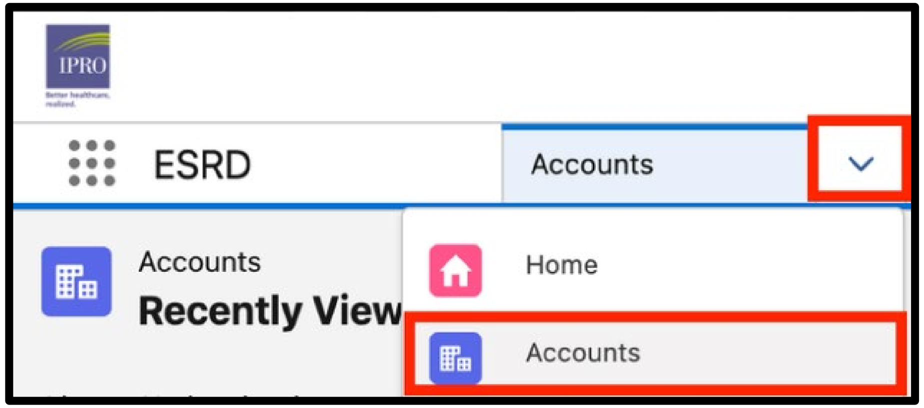
The Account layout contains basic information on a facility. You can get a quick-glance view of:

- Which departments are working with an account
- Contacts
- Completed and assigned tasks
- Related information
- Attached file records

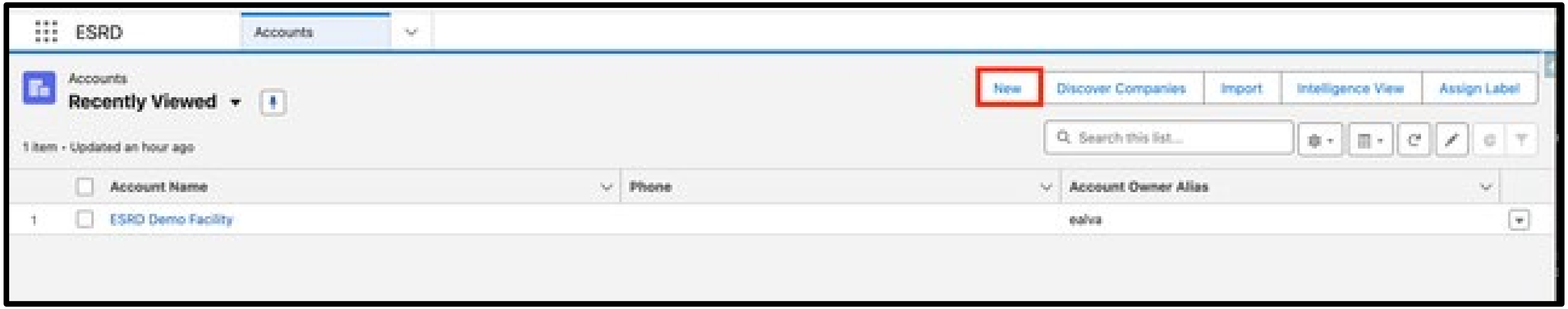


Creating a New Facility or Account

From the menu dropdown click Accounts.



Click the New button located in the top right corner



Creating New Facility or Account Types

New Account

- ○ Payer
  Replaces HealthCloudGA Payer Record Type
- ◉ Facility
  Used to capture Account information about facilities
- ○ Health System
  Used for Health Systems
- ○ Provider
  Represents a Provider (used by CMS IDR)

Account Type	Associated Account Sub-Types	
Community Organization	• Faith Based Organization • School or Educational Institution • Social Service Group • Community Center (Federally Qualified Health Centers)	• Aging Resource Center • Disability Resource Center • Adult Day Care • Transportation Service
Facility	• Hospital • Dialysis Center • Kidney Transplant Center • Home Health Agency • Hospice Center • Laboratory • Nursing Home	• Pharmacy • Clinic • Physicians Office • Mental Health Center • VA Medical Center • VA Dialysis Center • VA Transplant Center
Government Organization	• Department of Health • Department of Corrections • Emergency Management • Veterans Administration	• Policy Agencies • Federal Agencies • State Agencies
Professional Association	• Care Partner Advocacy • Patient Advocacy • Professional Advocacy • Research Institute	

Select Facility and click Next.

There are multiple Facility Account Types and Subtypes to further specify the type of account being created.

Tip: Review the Account and Contact Management Best Practices in Salesforce Training for more details on the creation and management of different account types.

Adding Designations to an Account

Accounts can have Multiple Designations

Review and Understand the Designation Definitions on the Salesforce Portal

IPRO

Designations are important to use in identifying and grouping accounts when creating list views, deliverable reports and sending communications

- More than one Designations can be added to an Account
- Designations are shared between departments and are visible to all users
- Business areas may have different Designations for the same shared Account
- Never delete a designation that you did not add without consent from the other business lines.

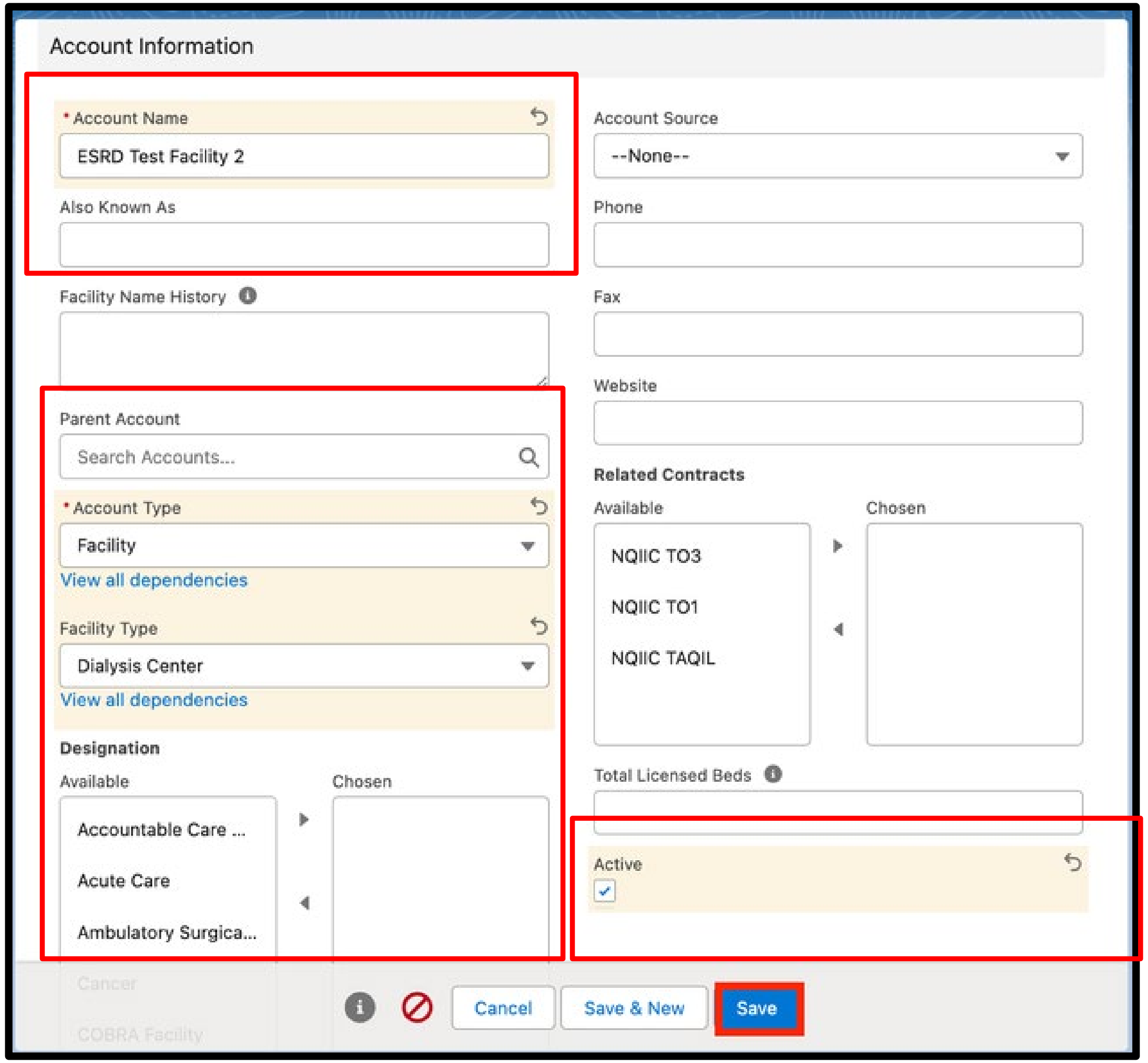
Types of Designations

- Accountable Care Organizations
- Acute Care
- Ambulatory Surgical Centers
- COBRA Facility
- Critical Access
- Designated AIDS Center
- Diagnostic and Treatment Center Extension Clinic
- Drug Treatment Center
- Emergency Department
- Emergency Department Approved for Pediatric Critical Care Center
- Emergency Department Approved for Pediatrics
- Extension Clinic
- Federally Qualified health Center (FQHC)
- General Medical and Surgical Hospitals
- Home Care Program
- Hospital Unit of an Institution
- Indian Health Services Hospital
- Inpatient
- Inpatient Prospective Payment System (IPPS)
- Licensed Agency
- Long-Term Acute Care Hospital
- Magnet Recognition Program
- Medicare Certified
- Non-Designated AIDS Center
- Outpatient
- PACE Program
- Palliative Care
- Pediatric
- Perinatal Unit
- Primary Care Practice
- Private MD
- Psychiatric
- Rehabilitation
- Rural
- Rural Emergency Hospital
- Special Needs Plan
- Specialty
- Stroke - Acute Ready
- Stroke - Comprehensive Center
- Stroke - Primary Center
- Substance Use
- Surgical Center or Ambulatory Care Surgery Center
- Urban
- Urgent Care Center

Creating New Account

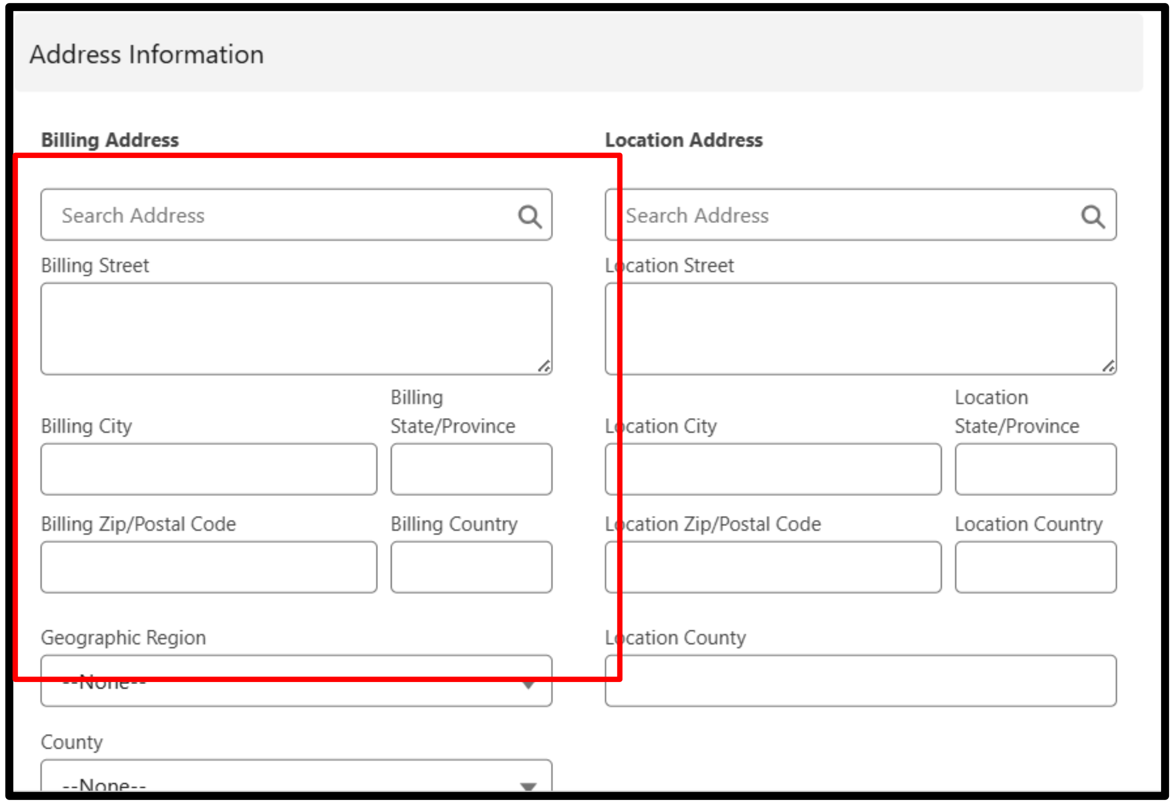
1. Enter the *Account Name
2. Enter the Also Known As Name (sometimes called Doing Business As Name)
3. Search for a Parent Account, ex: for a Facility that could be Davita or a hospital group, for a Government Organization it could be Veterans Affairs or a State Agency
4. *Account Type - Facility, Community Org, Government Org
5. *Facility Type (select 1): Dialysis Center, Transplant Center, or Hospital
6. Choose Designations (select as needed): Hospital Based Renal Dialysis Facility, Hospital Based Satellite Renal Dialysis Facility, Transplant, Urban, Rural etc.
7. Mark the Facility as * Active

TIP: You can find the full list of Designations here https://salesforce.ipro.help/hc/en-us/articles/34432995448467-Account-Designation-s

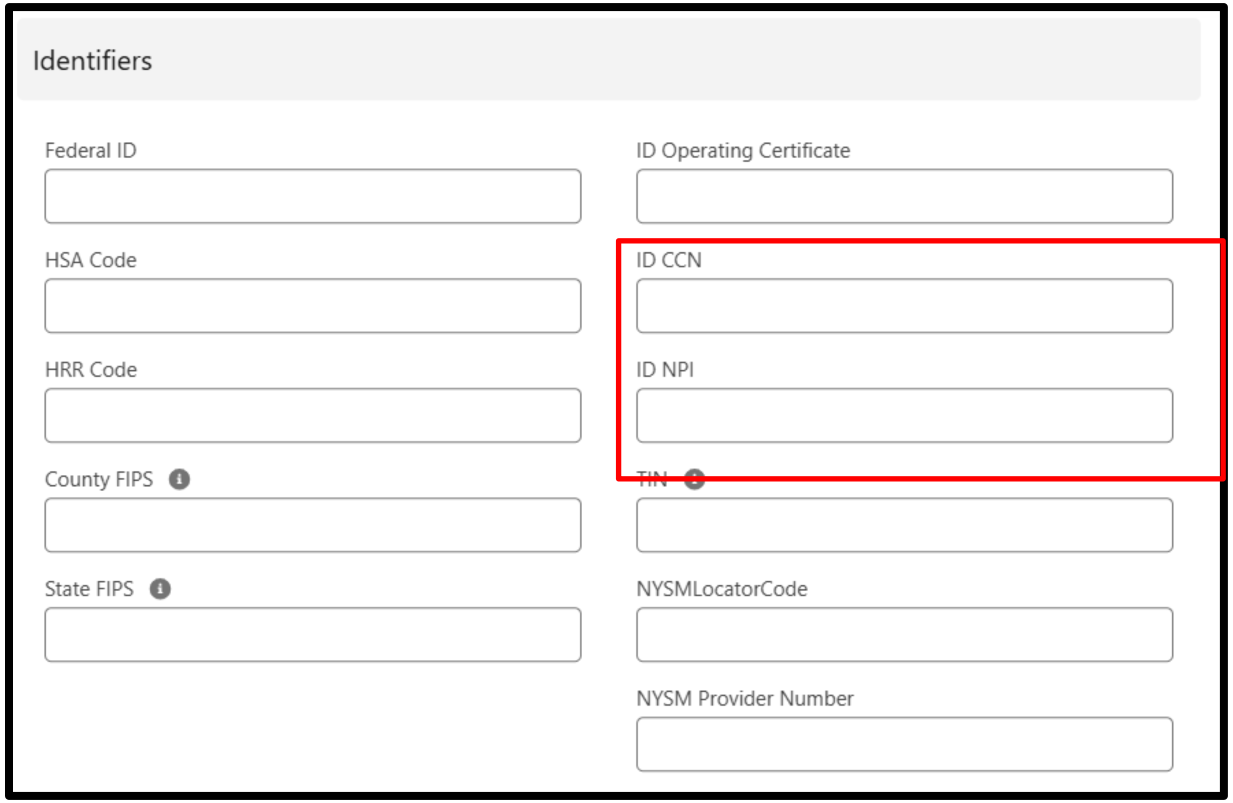


Creating New Account

Enter the Billing Address (this can be the same as physical location is no billing address is known)



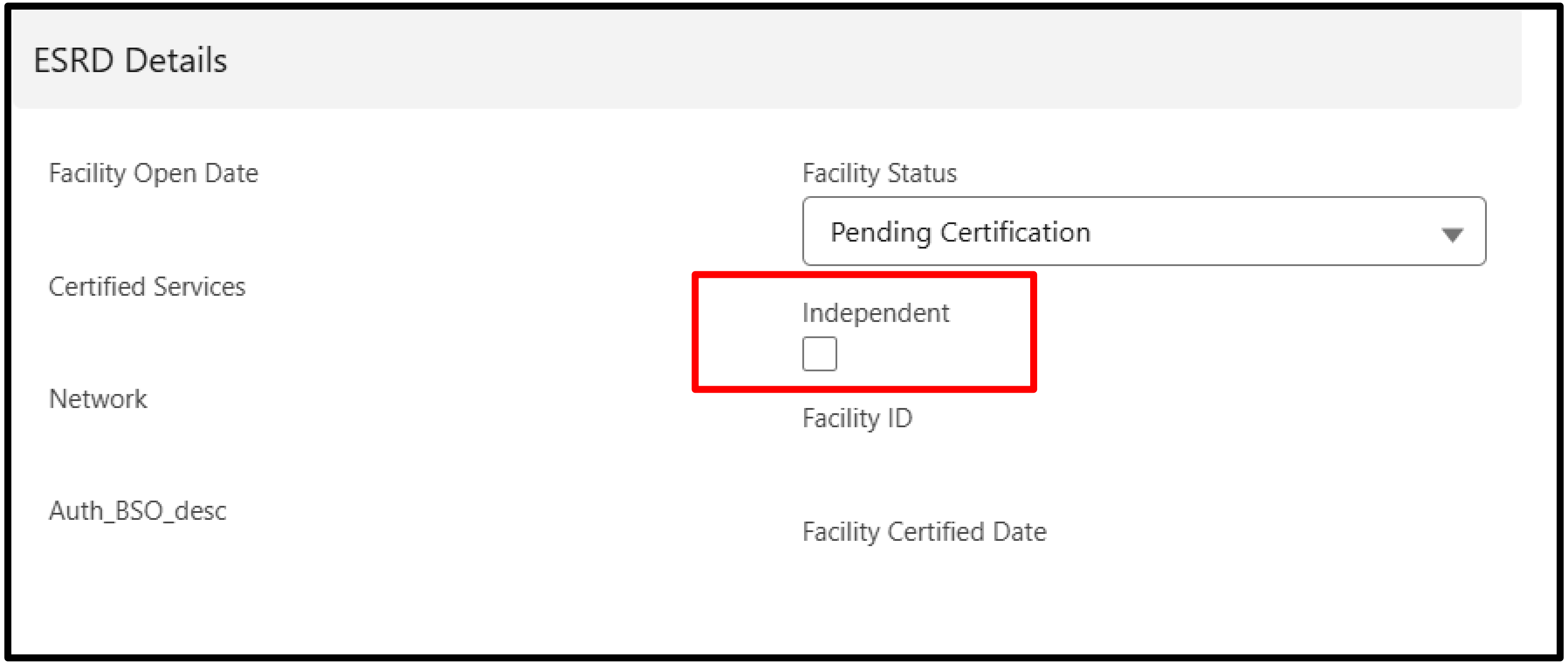
Enter the ID NPI or ID CCN (new facilities that are pending certification will require an ID NPI be added until certification is complete)



All fields with a * red asterisk are required along with Billing Address OR Location Address and ID NPI OR ID CCN OR TIN before saving the record

Creating New Account

If Facility is Independently owned leave Parent Account blank under Account Information section and select the Independent (Checkbox) under the ESRD Facility Details section



Contacts

Salesforce Contacts

Connecting Contacts to Accounts

Tip:

- There can be many contacts associated with an Account, and a single contact can be associated with multiple Accounts.
- Contacts can be associated with Health Systems to capture roles that work organizationally to in support of facility operations.

IPRO

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Contacts

Individuals associated with an Account.

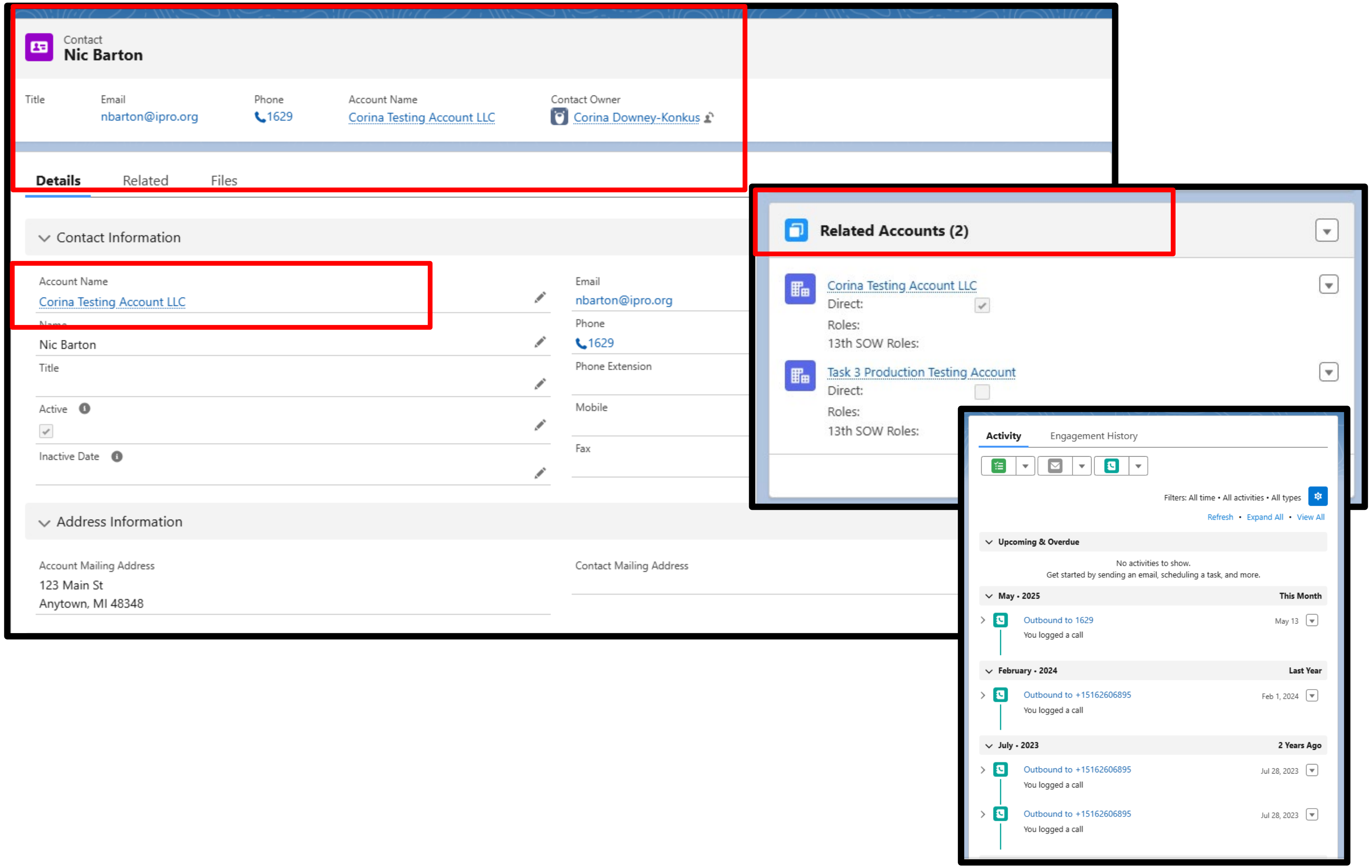
1 or many contacts assigned

Examples:

- UNC Healthcare - Sally Smith
- Montefiore - Tom Jones
- White Plaines – Tom Jones
- Talladega Ins - Ricky Bobby

Contact Screen Layout

- Like with the account, the Contact record will have all the important details listed
- Salesforce requires that each Contact is assigned a Primary Account Relationship, and all other relationships are considered secondary
- The Primary relationship is the Account listed on the main page of the Contact Record
- Additional Related Accounts are found in a side panel as well as Activities



Contacts

Enforcing Uniqueness in Contacts

Required Fields to add/save a Contact:

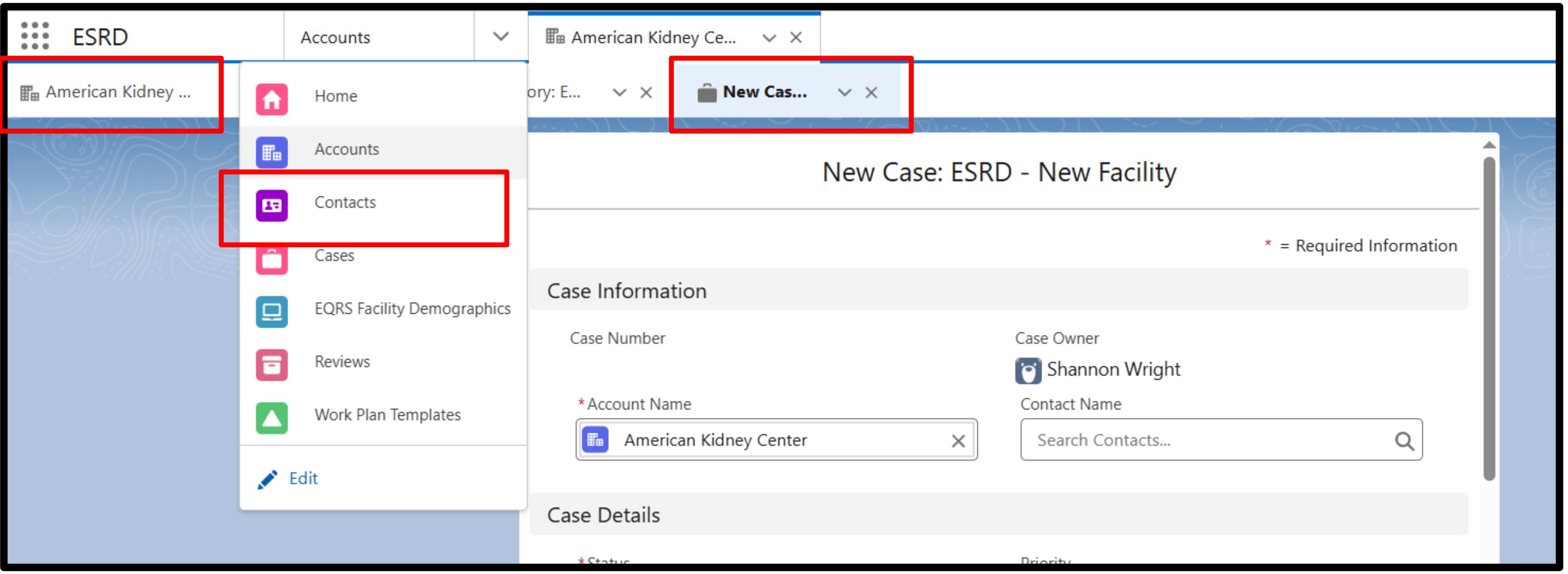
- Contact Formal Name
- Account Name
- One method of contact: Phone Or Mobile Number Or Email Address

Fields that should be added as soon as the information is known, but not required to save record:

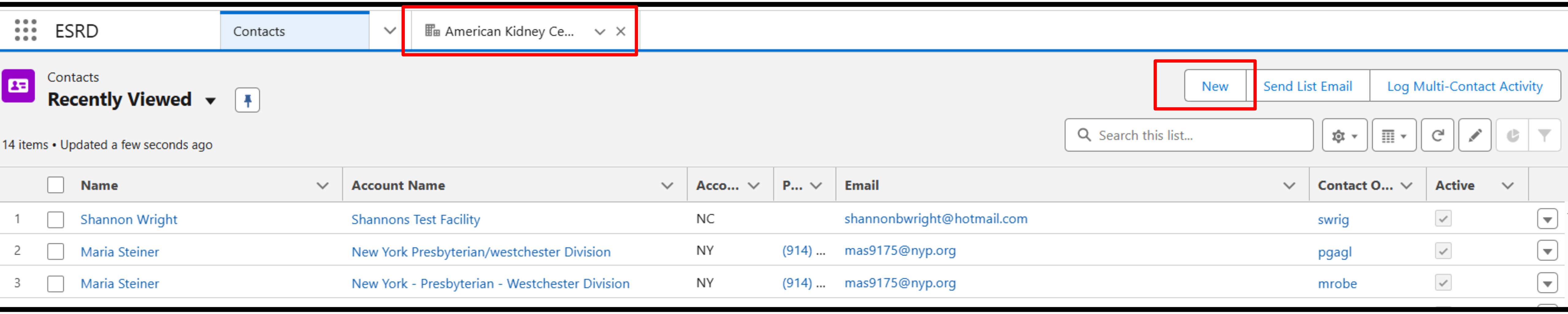
- Mailing Address
- Title
- Contact Role
- Email or Phone (if not already populated in the primary creation)
- Additional Account Relationships

Risk Alert: All contacts should be assigned contact roles. Contact roles are critical to support segmentation for communication distribution

Creating a New Contact

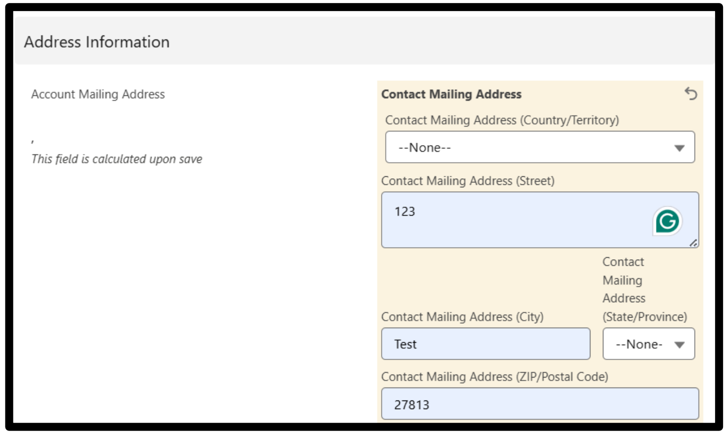


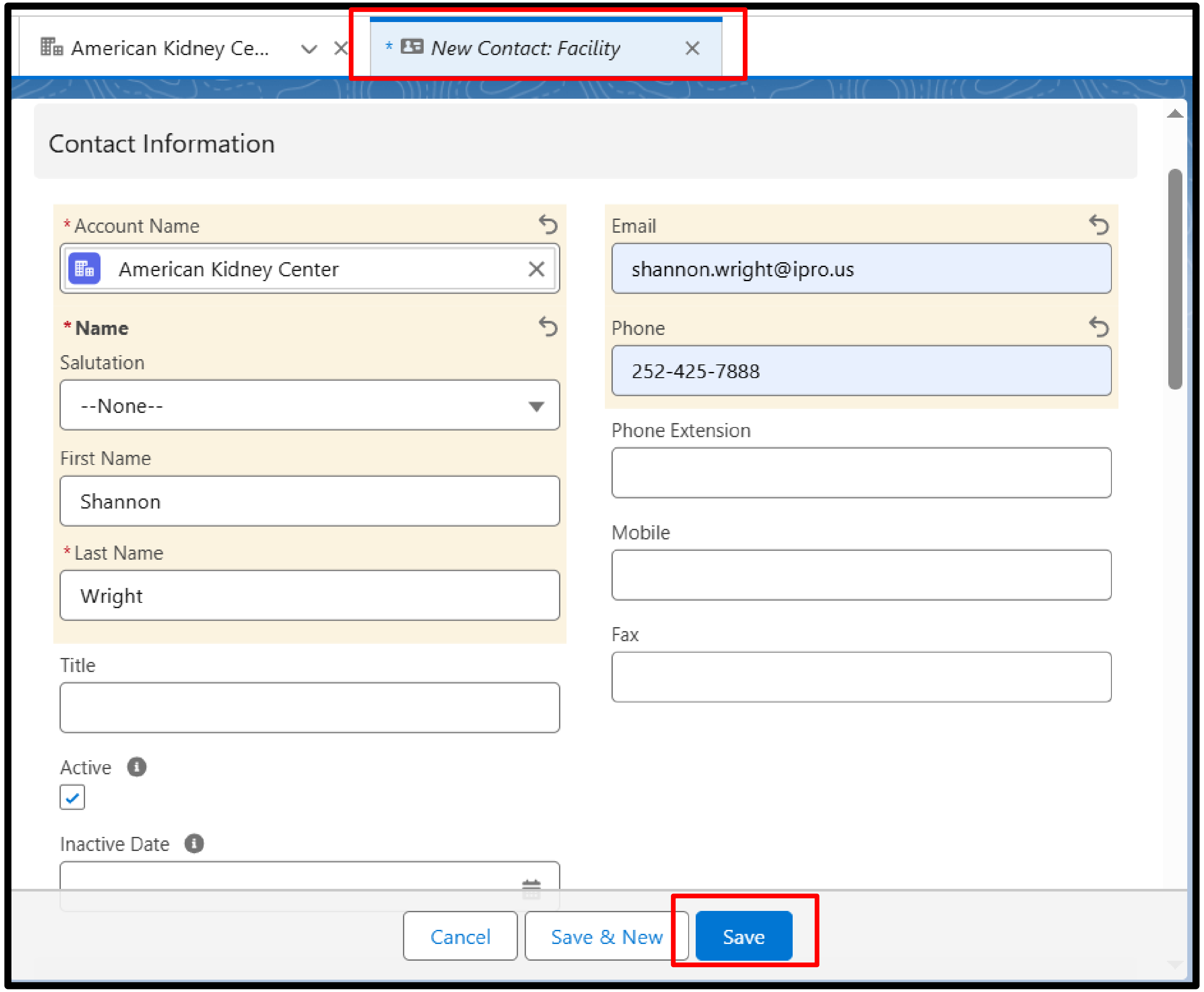
- Before adding a new Contact, use the search to see if they already exist. If they do not, create new
- From the dropdown, Select Contacts
- Select New to create a new Contact
- **Note:** A separate tab is created, the American Kidney Center Case Tab and Account tab are still available



Creating a New Contact

- Search for the Account Name to be assigned to the Contact
- Enter the Contact information **Note:** Name and either phone or email is required.
- The Address section is optional
- Click Save





Accounts, Contacts, and ACR Objects

How does everything tie together?

Since a Contact can be associated with many Accounts, and an Account can have many Contacts, the Account Contact Relationship (ACR) Object ties them together capturing the many-to-many relationship that can potentially exist between Accounts and Contacts.

It is through the ACR that users assign different Roles that a Contact may have to each different Account.

Account	Contact	Business Unit 1 Role	Business Unit 2 Role
Hospital A	John Smith	Data Contact	
Hospital A	Charlie Chaplin	CEO	Moustache Groomer
Hospital B	John Smith	Administrator	Data Contact
Hospital B	Ron Smith	Medical Consultant	Medical Consultant
Hospital B	Don Smith	DON	
Hospital C	Charlie Chaplin	CEO	Hat Salesman

- John Smith is a contact at Hospital A and Hospital B.
- Contacts have a Role assigned for each ACR. Roles can be specific to a business unit, or they can be the same across multiple business units
- Hospital B lists John Smith as the Administrator for Business Unit 1, and the Data Contact for Business Unit 2, Ron Smith as the Medical Consultant, and Don Smith as a Director of Nursing
- John, Ron, and Don will only exist in the Contacts Object once
- Hospital A and Hospital B will only exist in the Accounts Object once

Adding Contact Roles

Review and Understand the Contact Role Definitions on the Salesforce Portal

IPRO

Roles are important for use in identifying and grouping contacts to identify the person's responsibilities, deliverable needs, and sending communications

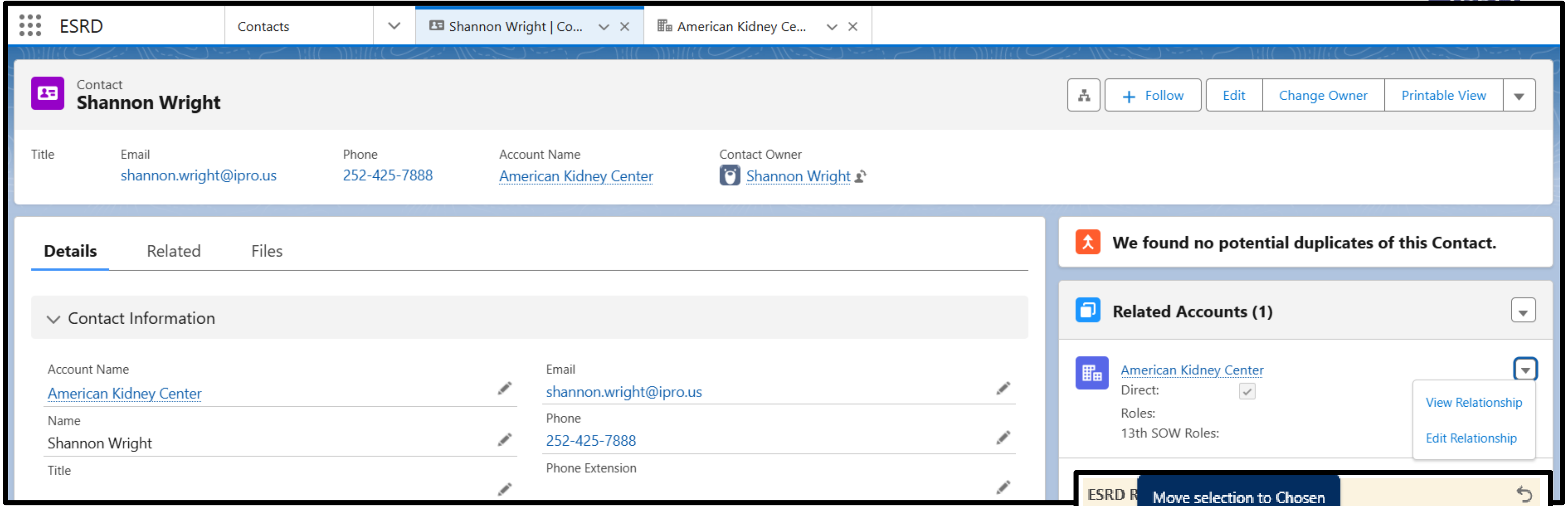
- Contacts can be connected to multiple accounts and can serve a different role or function for each account or IPRO department they work with.
- Each IPRO Department can assign their own Contact Role or Roles to each Contact, selecting from a Data Governance approved list
- **Department Specific information can be included in the title of the contact**

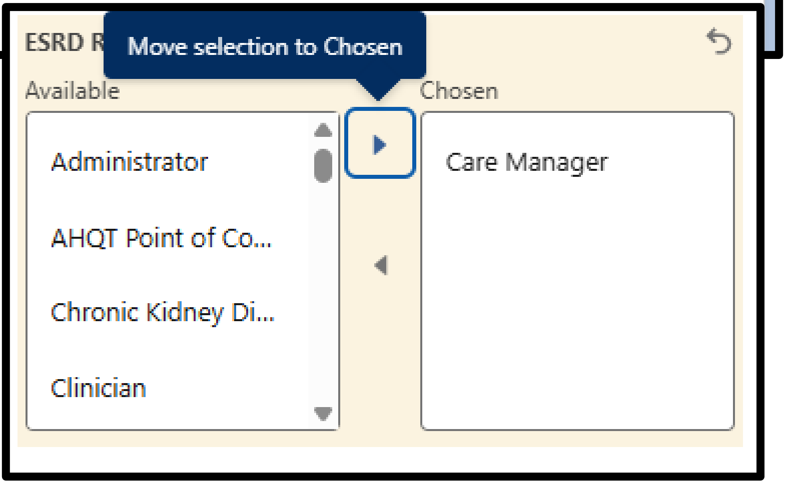
Salesforce Role	ESRD Role / Title
• Administrator	• Dialysis Administrative Assistant • Dialysis Facility Administrator • Transplant Center Administrator
• Care Manager	• Transplant Center Coordinator
• Corporate	• Regional Director of Operations • Regional / Divisional Vice President
• Data Contact	• Dialysis Data EQRS Contact • Transplant Center Data Contact • Transplant Center EQRS Transplant Editor Role
• Dietician	• Dietician
• File Uploader	• Transplant E-Start Contact
• Infection Prevention	• Dialysis Infection Prevention Lead

Salesforce Role	ESRD Role / Title
• Medical Director	• Dialysis Medical Director • Transplant Center Medical Director
• Medical Office Staff	Dialysis Administrative Assistant
• Nurse or Nurse Practitioner	• Dialysis Physician Extender Role (NP or PA)
• Nurse Director	• Dialysis Head Nurse / Nurse Supervisor
• Physician	• Transplant Center Nephrologist • Dialysis Nephrologist
• Surgeon	• Surgeon
• Quality	• Regional Quality Manager
• Social Worker	• Transplant Center Social Worker • Dialysis Social Worker

Salesforce Role	ESRD Role / Title
• Home Dialysis Program Manager	• Home Dialysis Program Manager
• Chronic Kidney Disease Educator	• Chronic Kidney Disease Educator
• State Surveyor	• State Surveyor
• Healthcare Coalition Lead	• Healthcare Coalition Lead
• Patient/Caregiver Representative	• Patient/Caregiver Representative

Creating a New Contact





- From the newly created contact record, add the role(s) of the contact by selecting the Add Relationship in the Related Accounts section
- Scroll until you see your department’s list and select the role(s) to assign to the Contact and Save the record
- Click Save

Cases

Cases

- Cases is the object where the majority of the IPRO team does their departmental work.
- Depending on the department, a Case can represent different things:
    - An individual dispute that IPRO is evaluating
    - Quality Improvement Initiative
    - Technical assistance
- Cases capture all the relevant data IPRO needs to properly manage and execute our contracts. Exactly what data is shown on a Case is determined by the need of each department.

TIP: Where Account and Contact data and interactions are shared with other departments, Case information and interactions are viewable only within the department to which they belong.

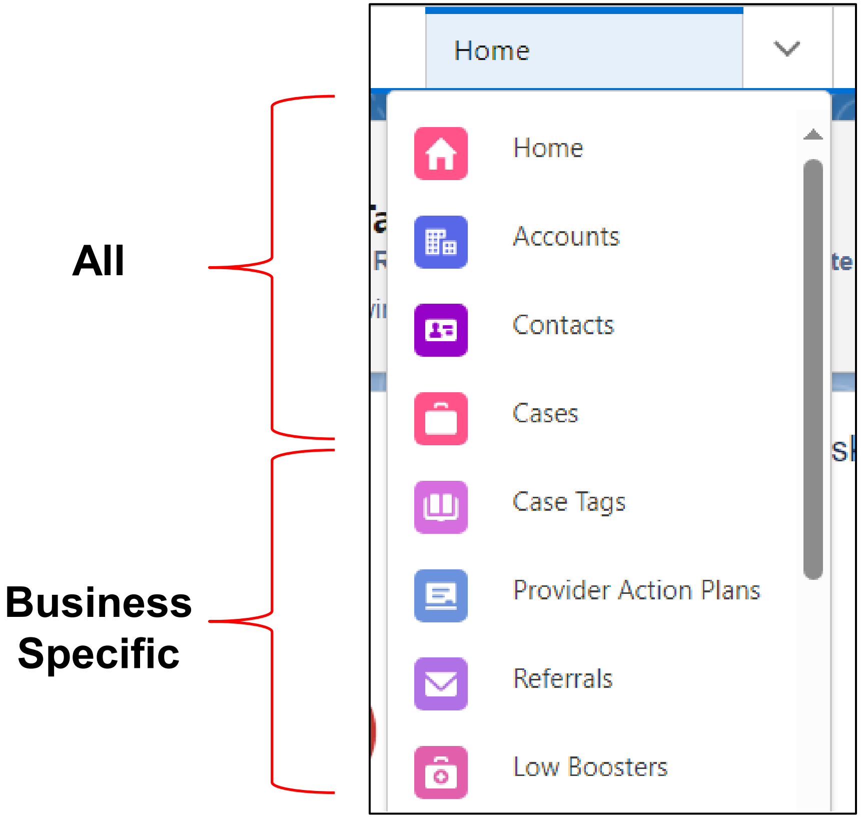
Final Note on Salesforce Objects

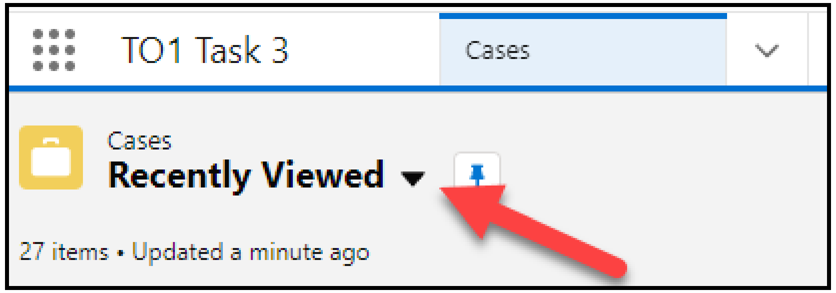
- All business areas have Home, Accounts, Contacts, and Cases object access
- Additional Salesforce objects may be created specifically to meet the needs of your business area
- Outside of Account and Contact, Salesforce data security limits access to other Objects and is considered private to the department who created it

Part 4: Leveraging List Views

List Views

- List views are a filtered list of data stored in an object. To access List views, use the dropdown box and select the object that you would like to access a subset of data from.
- Each object will have a different set of list views and access to the views might be limited by department
- The list view will default to the user's "Recently Viewed" list, but you can change the list view by using the dropdown arrow
- User can pin their favorite list view by clicking the push pin icon next to the list view arrow





Anatomy of a List View

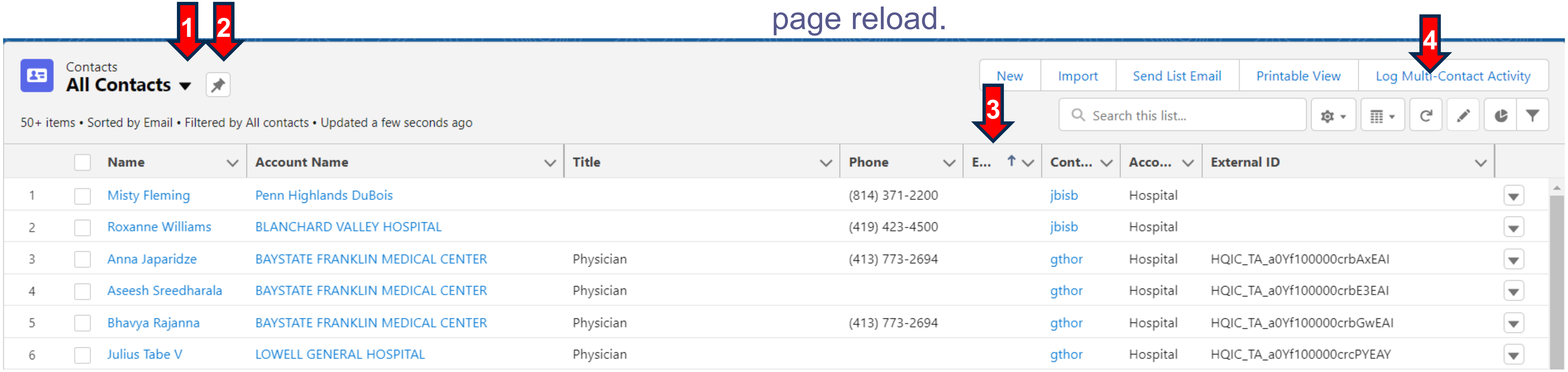
The Salesforce Support Team will use filters to create curated list views that can be utilized for each department

1. List View dropdown menu - Click ▼ to access your list views.

2. Pin list icon - Click to pin a list view. A pinned list is the default.

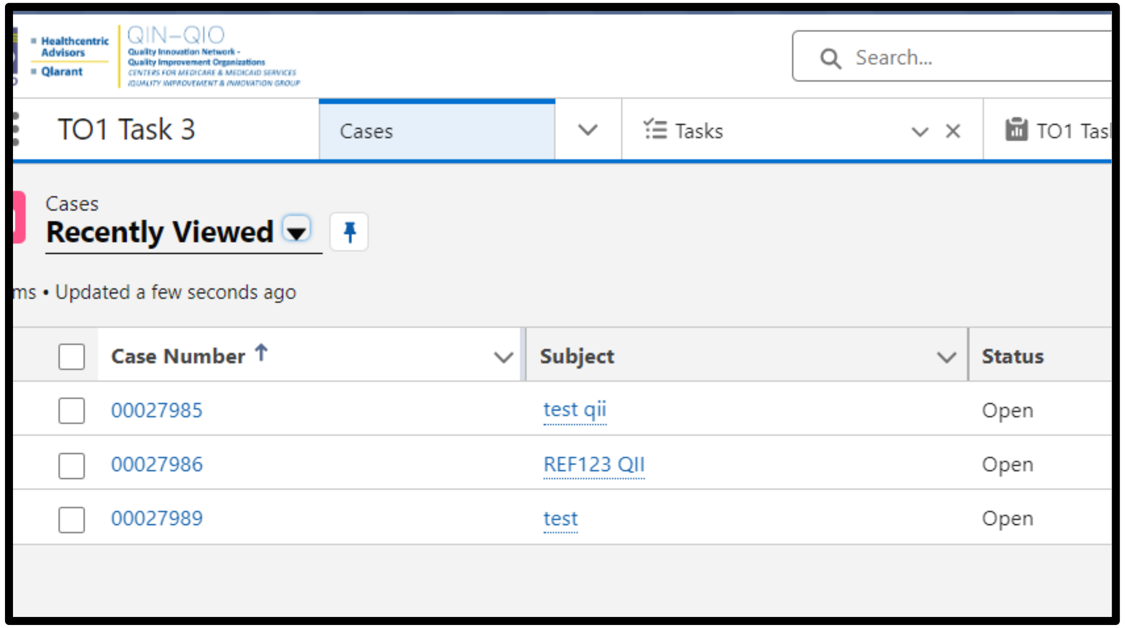
3. To sort the list, you can click on any column. You will see a small arrow next to the column you sorted that indicates there's a sort in use

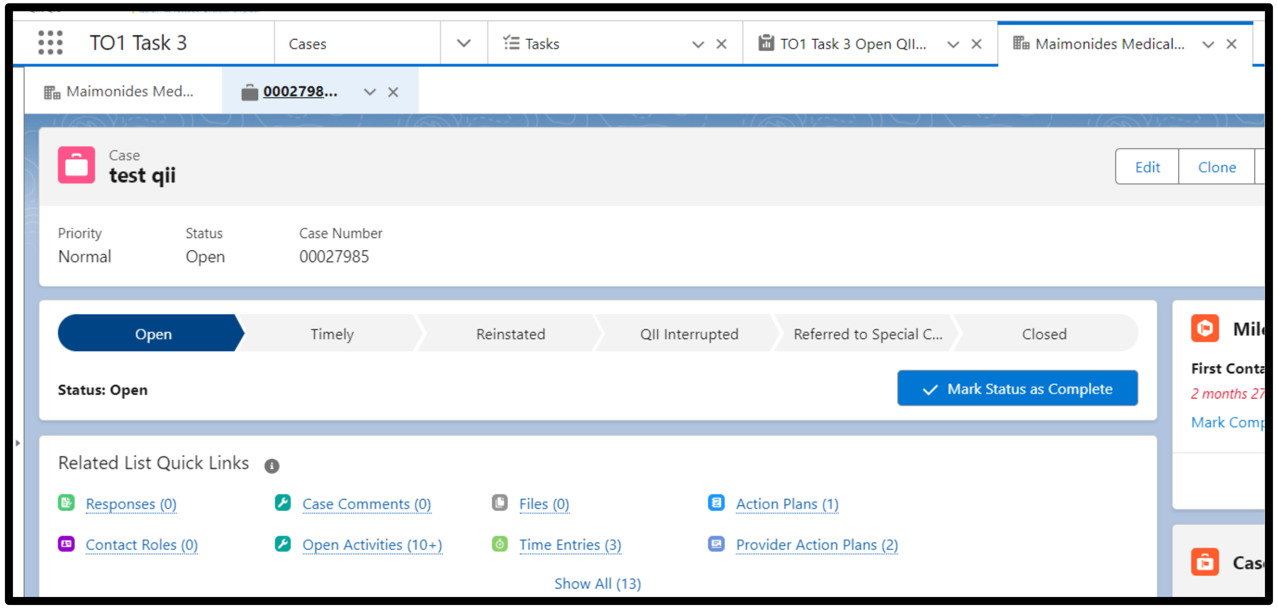
4. Refresh icon - Click to get a fresh view of a list more quickly than doing a full page reload.



Quick Access from List Views

List views are a convenient way to access multiple data points on an object at a glance, but it can also be used to navigate directly to a record page by selecting one of the fields hyperlinked in blue.

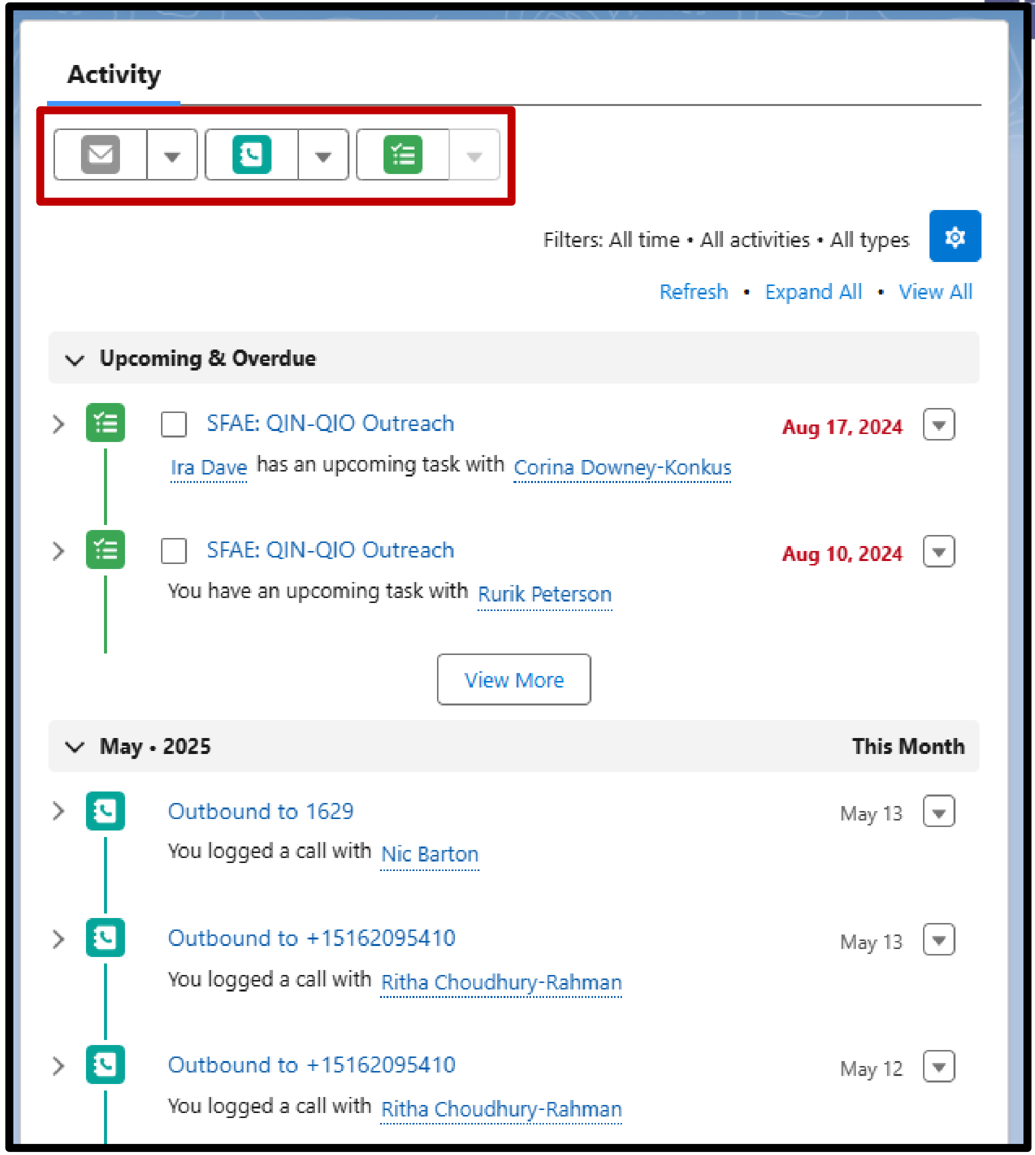




Part 5: Using Activities and Work Plans

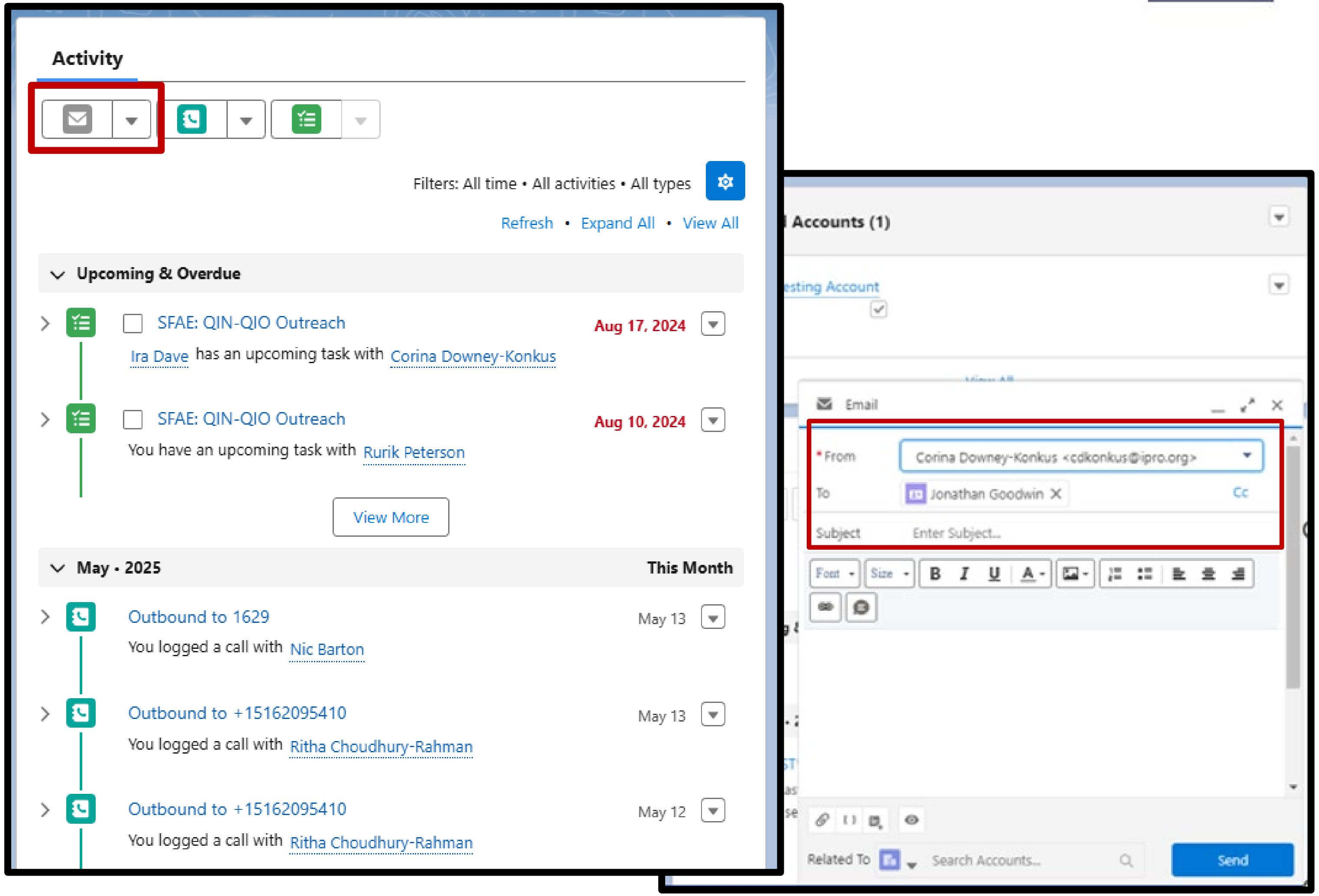
Activity Tracking

- The Activity Panel is where you can create an email, detail a phone call, or log a future or completed task.
- Activities relate to the record they are attached. It is important to remember visibility when creating Activities.
    - The Account and Contact objects are visible to all IPRO staff, adding activities here would make them available to other departments.
    - Cases and other custom objects are limited to specific departments, and therefore activities created there have no visibility to the rest of IPRO.



Sending Email from Salesforce

- When you click the email icon, an email widget will appear and automatically put your information into the From line.
- Add the Contact you want to send the email to by either searching the contact name in the To line or manually add the email address.
- Depending on the object you are creating the email from, the subject may or may not auto populate. You can change any of the information in From, To, or Subject prior to sending the email

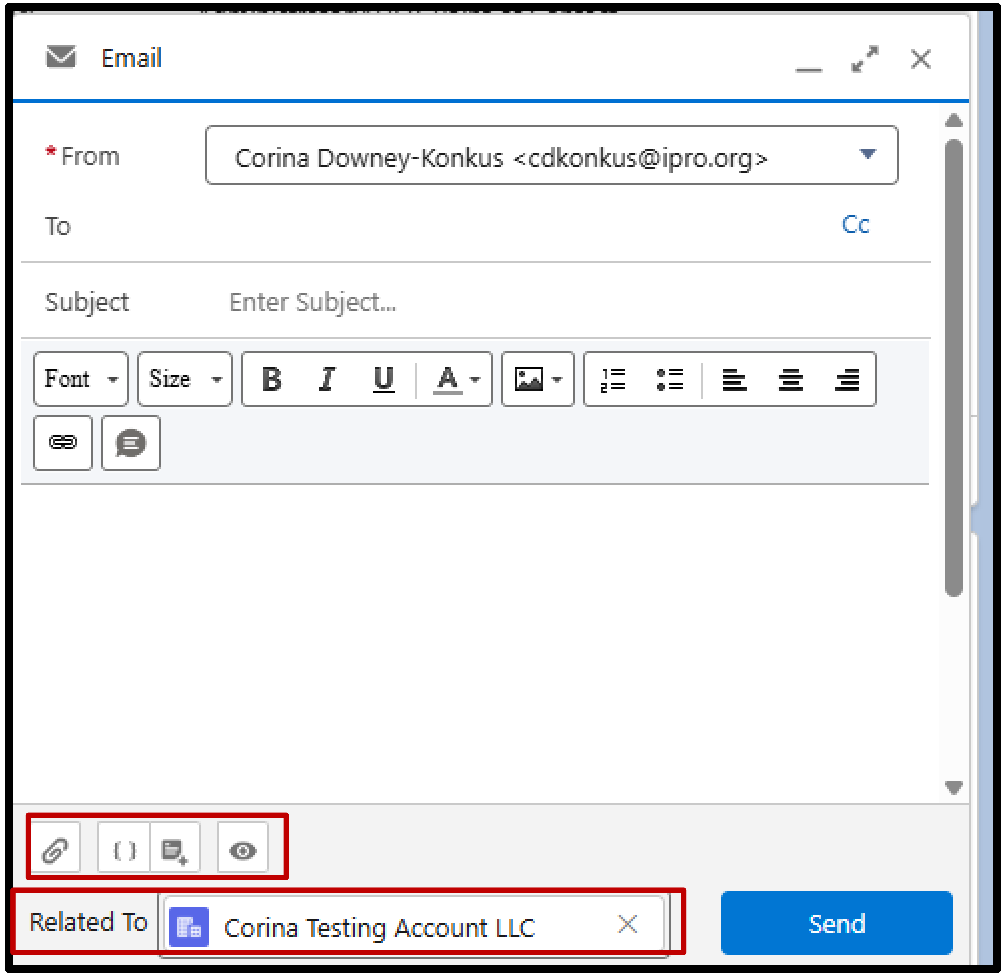


Activities: Sending Email from Salesforce

At the bottom of the email pane you will see a series of icons.

- The paperclip allows you to attach a document to the email
- The brackets allow you to insert a merged field
- The document allows you to select from pre-created department templates
- The eye shows you a preview of the email with all merge field data prior to sending

One more important field to note is the Related To field. This field will attach the email you are sending to the record showing here. You can change this relationship by hitting the X to remove the record and then search for the correct record.



Current Salesforce email policy does not allow for the use of CC or BCC; add all contacts in the To field. Per IS security, do not use Salesforce to send PHI or PII.

Salesforce and Outlook Integration

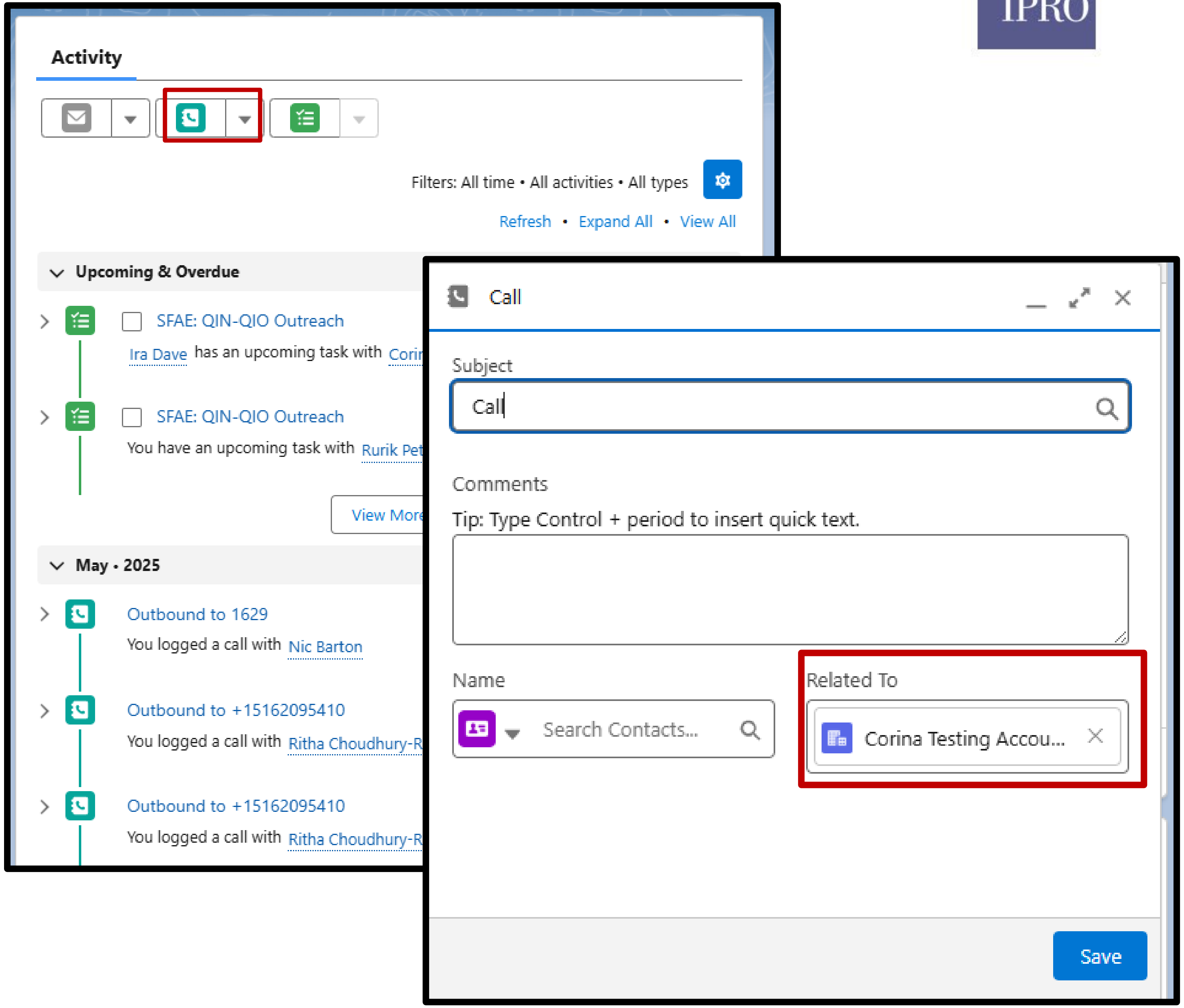
Outlook and Salesforce can be connected to capture a copy of emails sent to providers, facilities, hospitals, or other IPRO clients allowing for future reference or deliverable reporting.

This integration allows you to send a copy of an email you have sent from Outlook or have received via Outlook over to Salesforce.

See the Outlook Integration documentation on the IPRO Salesforce Support page for setting up the Salesforce Plug-in for Outlook and detailed training https://salesforce.ipro.help/hc/en-us

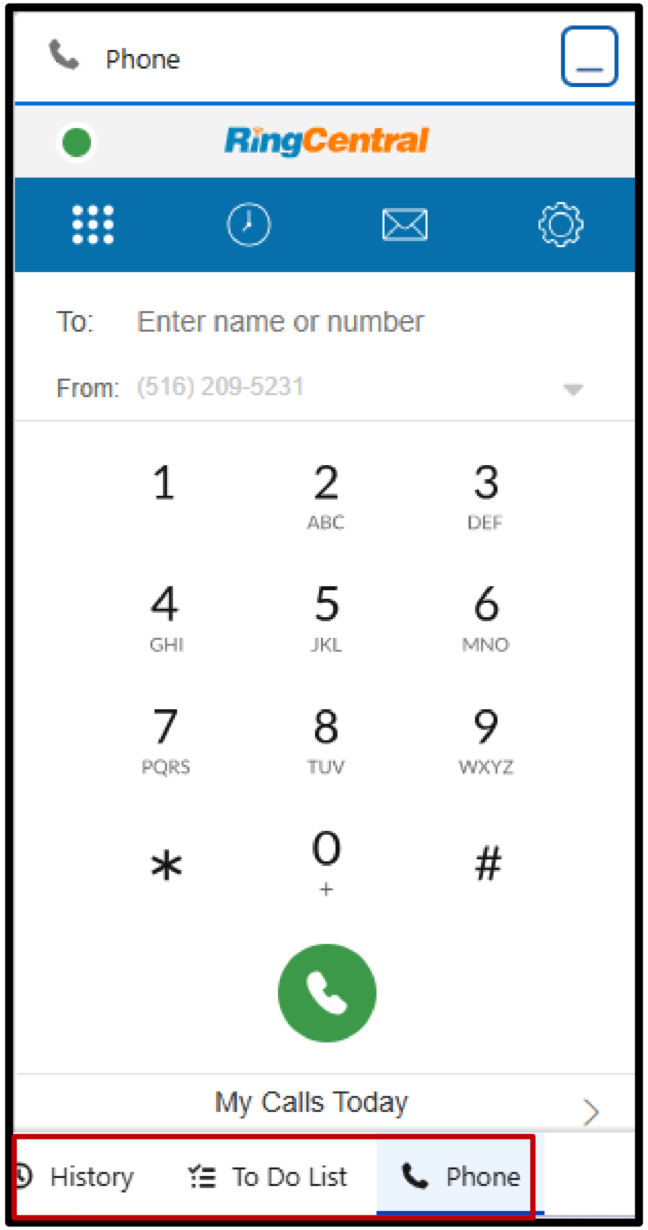
Activities: Logging a Call in Salesforce

- The “Log a Call” icon can be used to to create notes for a call that has taken place in the past and has not yet been recorded as an Activity in Salesforce.
- Change the Subject from Call to your departmental approved subject line or you can leave it as Call, then add any Comments about the call that was placed.
- Be sure to relate the Call to a Case or other appropriate Object based on the visibility needed for this activity.
- When saving the “Log a Call” activity, it will automatically set the record as Complete.



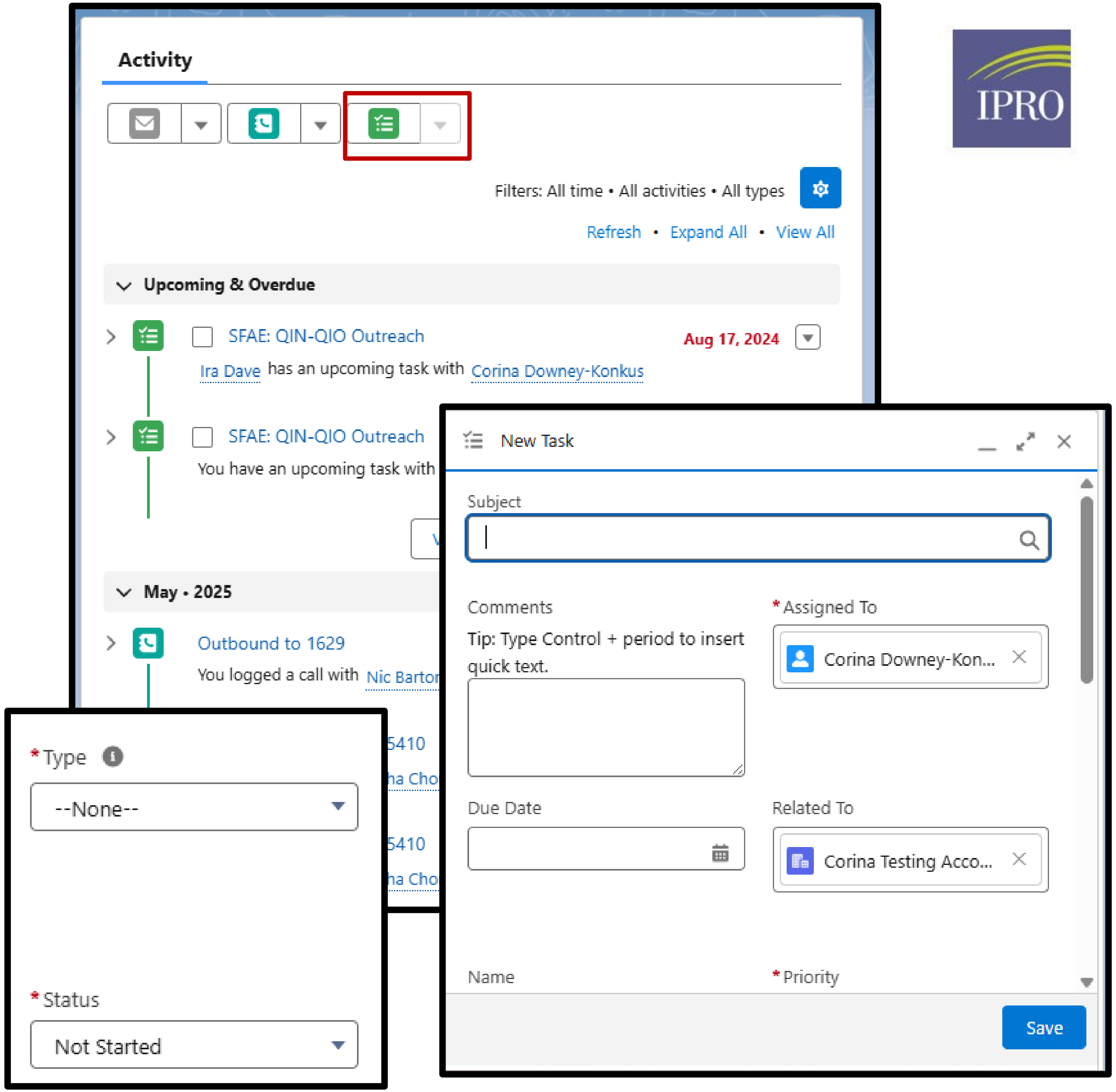
Salesforce and RingCentral Integration

- Salesforce utilizes RingCentral as the telephone service to capture details about a phone call, use the autodial functionality, and dial pad option.
- If you have a RingCentral phone number connected with Salesforce, you will see a bottom tool bar with a phone icon.
- See the RingCentral Integration documentation on the IPRO Salesforce Support page for setting up the RingCentral app and detailed training https://salesforce.ipro.help/hc/en-us



Activities: Creating a Task

- The Activity icon is used to create tasks for yourself or for other team members.
- Change the Subject to your departmental approved subject line, assign the task to yourself or someone else, and select a Due Date.
- Be sure to relate the Activity to a Case or other appropriate Object based on the visibility needed for this activity, add a Type and mark the Status as either Not Started or Complete.
- If you have assigned the task to be completed by another user, Salesforce will automatically send a notification to that user once you save the task.



Workplans: Creating a Task Series

- Workplans allows managers to create a template that contains a series of tasks that need to be completed
- Each department can have multiple Workplan Templates published

Work Plans > ESRD - Facility Closure - Permanent/Decertified

Activities

4 items • Sorted by Due Date • Updated a few seconds ago

	Subject	Assigned To	Related To	Status
1	Close Facility in EQRS	Torrent Test User	00213830	Not Started
2	Remove Access from IPRO Learn	Torrent Test User	00213830	Not Started
3	Obtain Closure Letter	Torrent Test User	00213830	Not Started
4	48 hour first response	Torrent Test User	00213830	Not Started

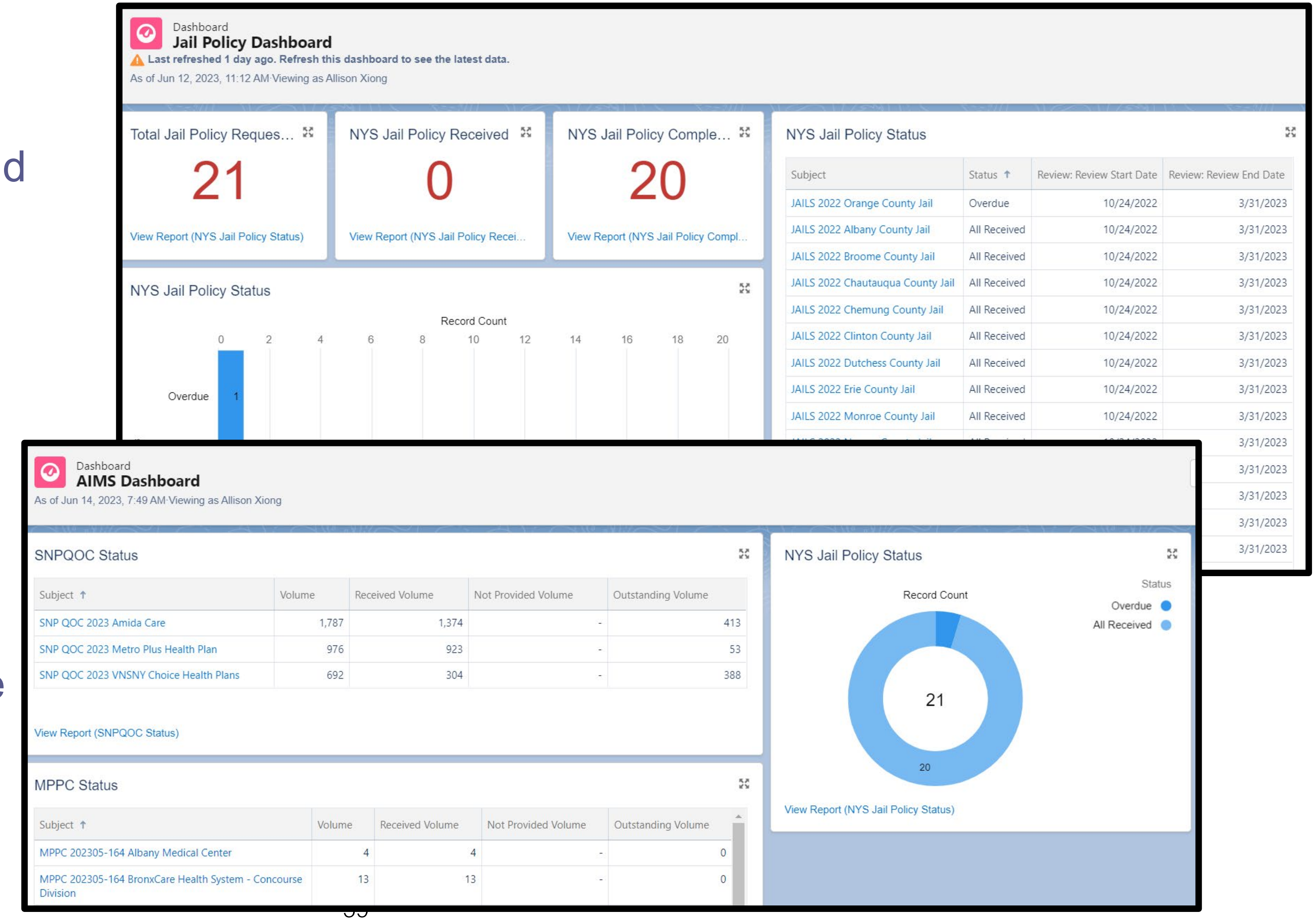
TIP: All templates should follow the naming convention of the department; ESRD, Task 3, 13th Scope etc. This naming convention will help the staff find the correct workplan to use quickly.

Part 6: Understanding Reports and Dashboards

Reports and Dashboards

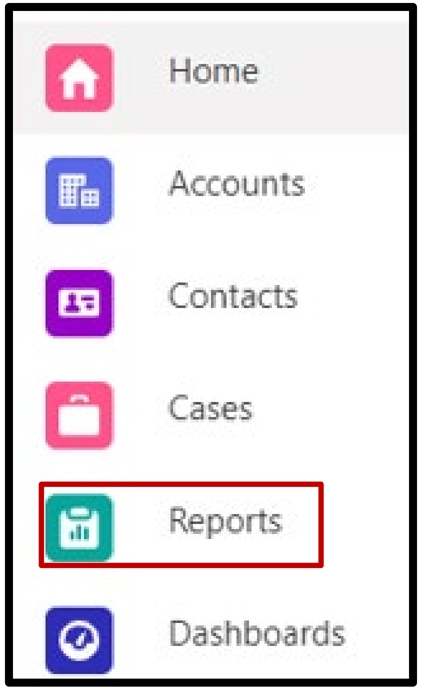
- Your business area Data Pros can apply complex filtering logic, summarize and group your data, perform calculations, and create sophisticated visualizations for data within Salesforce.

- For reports that require multiple data sources or to share directly with a Client, IPRO utilizes the Salesforce product Tableau.



Reports and Dashboards

- From the object menu, open the Reports object. Reports does not have a list view like other objects, instead it has a left-hand navigation that allows you to sort between Reports and Folders.
- To quickly find the reports you have available to you, use the folder search: Shared with Me.
- You will then be shown your department specific folder with all the reports you will need.
- If you don’t see the folder you are looking for, you can use the search. You can search by folder name or select All Reports and search for a report name.



Reports and Dashboards

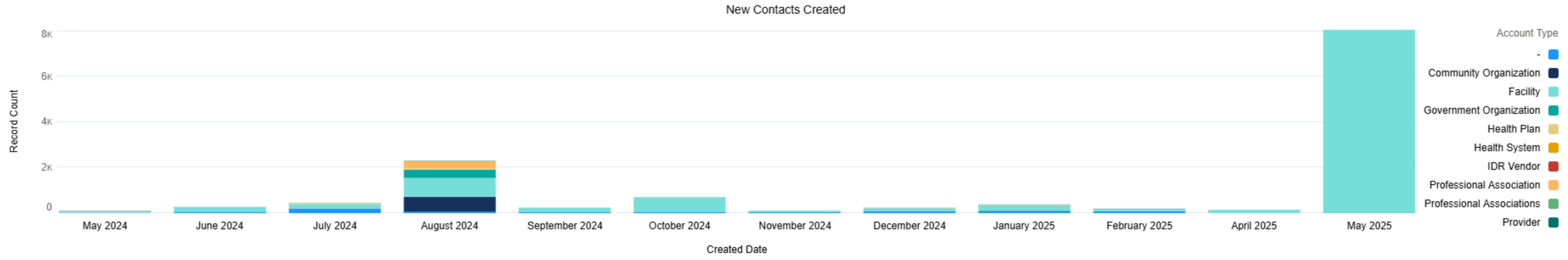
Reports can be used to identify productivity, provide cross sections of information, or monitor progression over time.

This report shows the number of contacts added per month over the last year, and groups them by the Account Type and Month.

Report: Contacts & Accounts
Adoption: New CONTACTS Trend
New contacts created in the last Year

Enable Field Editing | Edit

Total Records
13,240

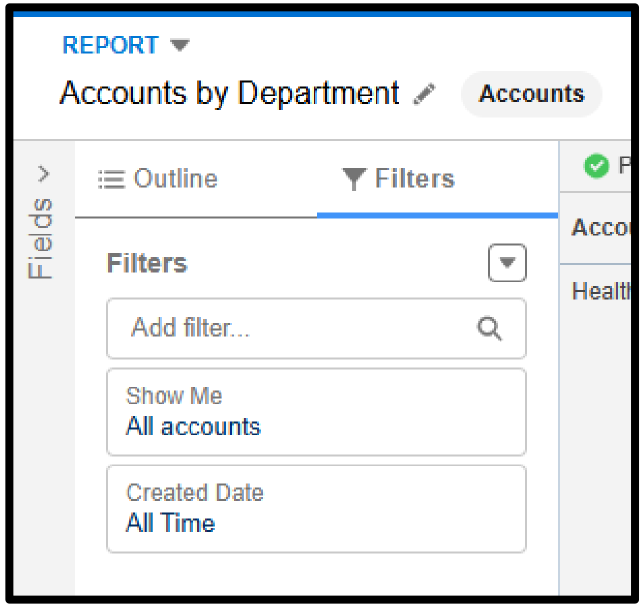


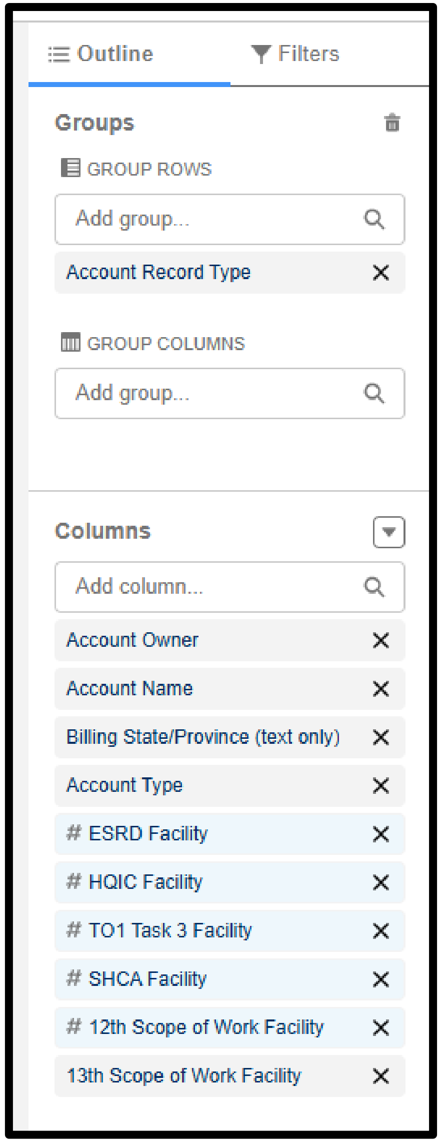
Created Date ↑	Account Type ↑	Record Count
May 2024	-	10
	Facility	78
	Health Plan	5
	IDR Vendor	9
	Provider	5
	Subtotal	107

Reports and Dashboards

When requesting a new report, there are 3 things you need to consider:

1. What objects and record types are involved?
2. What are you trying to solve or see?
3. What fields would you like displayed or groupings you may need?

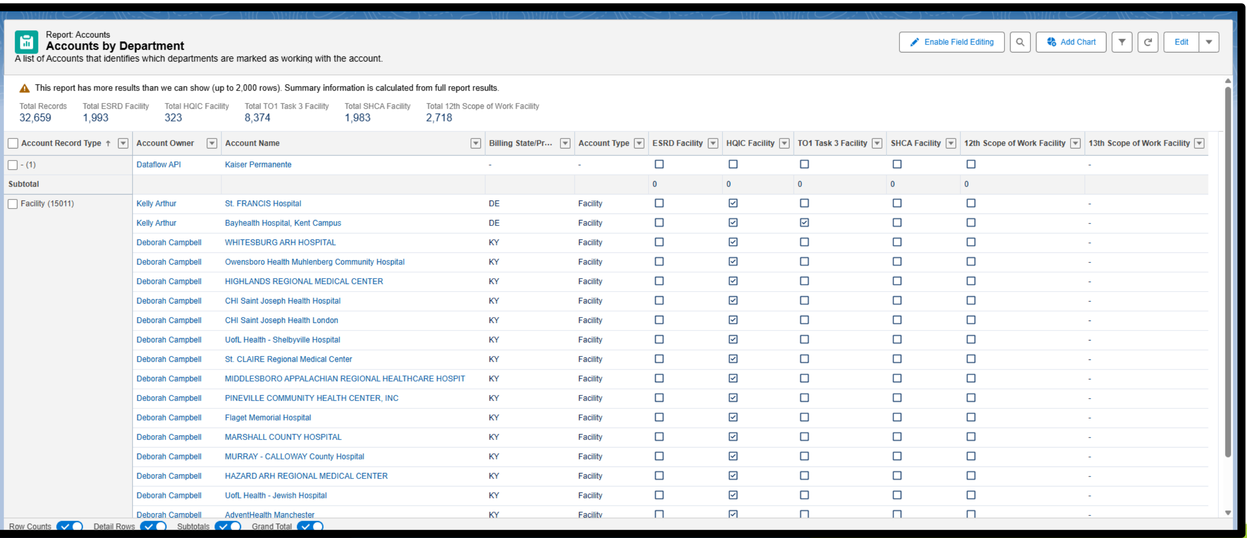




This example report is trying to determine which accounts are being used by each department. The criteria for the report is simple:

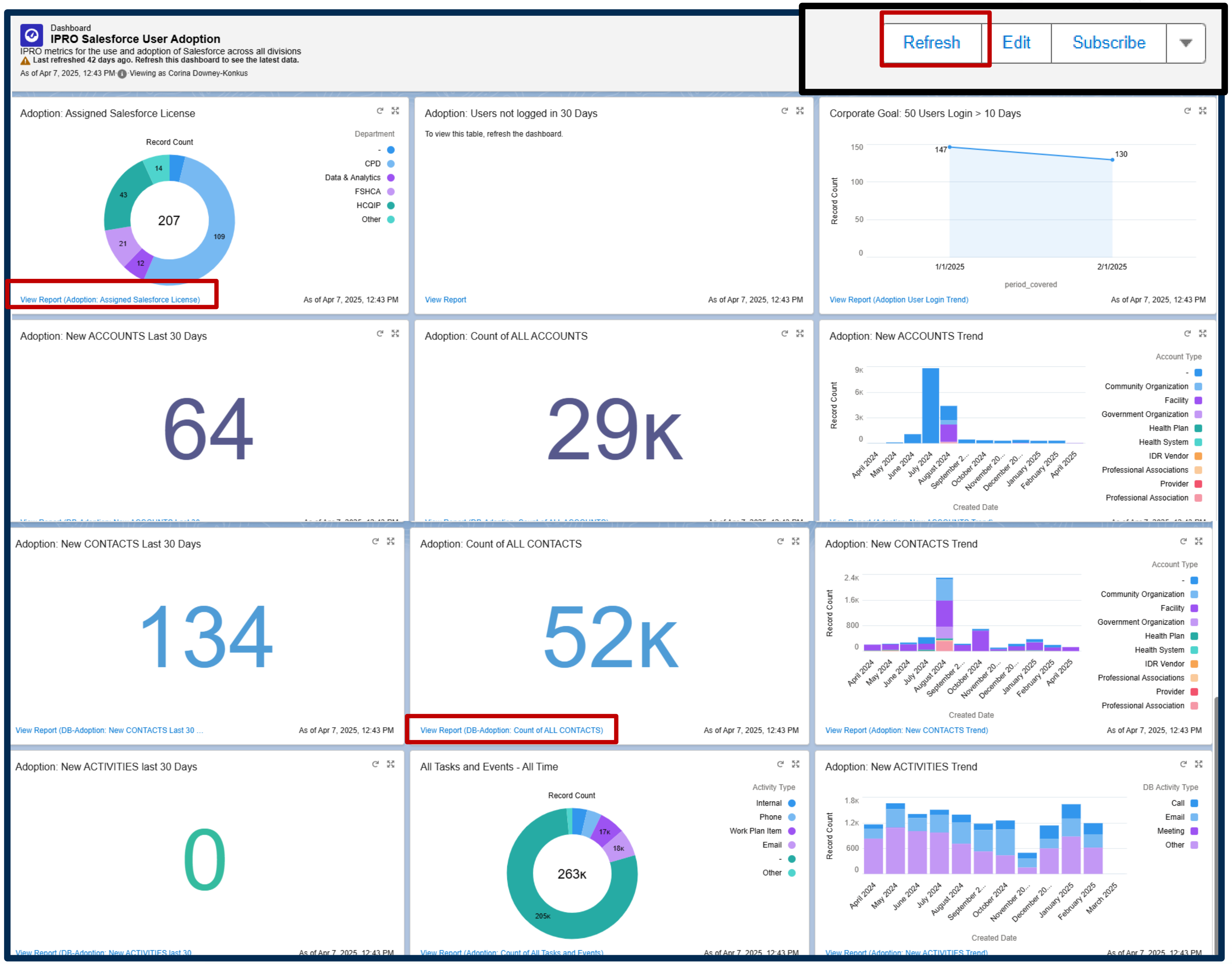
- All Account Records that were ever created
- Who owns the account, the account name, the state, the type of account, and finally a listing of all the possible departments
- To help display better, we would like it grouped by record type.

Example report

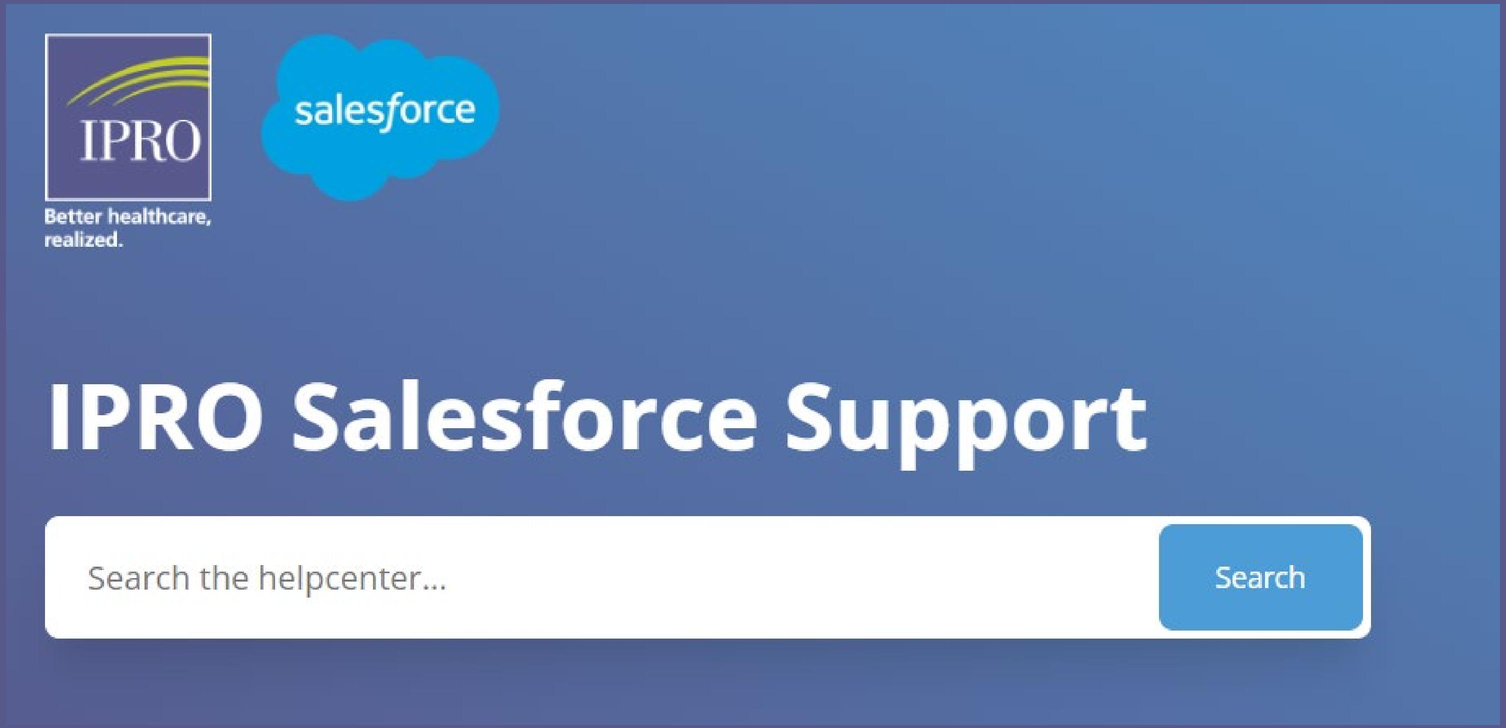


Reports and Dashboards

- A dashboard is a visual representation of multiple reports in one spot.
- Your department may have multiple types of dashboards for Executive Leadership, Management, or Staff.
- Each dashboard component is made up of a single report. You can drill into the report by clicking the blue link at the bottom of the component.
- For the most current updated information, use the Refresh button at the top of the page.



Questions?



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