



Exception Dashboards

The key to data your users can trust

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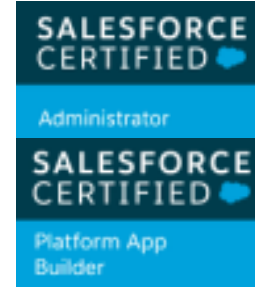
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SERCANTE

Background

- 1. Database Administrator
- 1. Educational Nonprofit
- 1. Accidental Admin
- 1. 2-times certified



Principal for a Day®

School Partnerships

Internship Programs

Poll

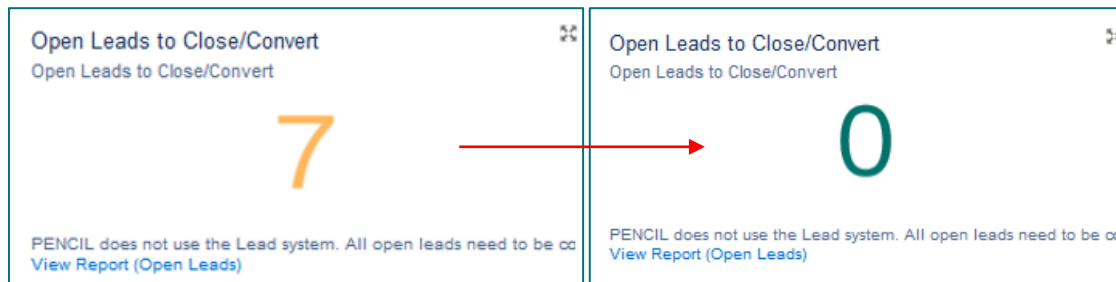


What is your experience with Salesforce?

- a) I am exploring Salesforce
- b) I am a business user (non-admin)
- c) I am a new Admin (less than a year)
- d) I have been an admin for more than 1 year

What is an Exception Dashboard

1. Show what is missing
1. Fill in the gaps
1. New Goal: 0!




Why does it matter

- 1. Data Quality Assurance
- 1. Increase adoption
- 1. Post Migration Clean Up
- 1. Find records “without” child records

Account Record Type	Industry
Organization	-
Organization	Energy and Utilities
Organization	Non-profit
Organization	-
Organization	Finance, Business and Insurance
Organization	Real Estate
Organization	Finance/Business/Insurance
Organization	TV/News Media/Entertainment
Organization	Real Estate
Organization	Information Technology
Organization	-

Attendance

Details Data

 Meeting Attendees (0)

New Change Owner

How to create Exception Dashboards



1. Review your data
 - AppExchange Tool: Field Trip
2. Create reports based on the review
 - Filters
 - **Blank values**
 - **Cross filters**
4. Build a Dashboard that will be the center of the exception reports
4. Subscribe to your Exception Dashboard to be on top of your data

A screenshot of a dashboard's filter configuration interface. On the left, a "Filters" panel contains five filter items: "Show Me All accounts", "Last Modified Date All Time", "Industry equals Other, "" (highlighted with a red box), "Account Record Type not equal to Household Account", and "Total Gifts greater than \$0.00". On the right, a sidebar shows a "Filters 3" header and two buttons: "Add Filter Logic" and "Add Cross Filter" (highlighted with a red box).

DEMO!

Questions

Thank you for coming



Directions for how to leave the session and find where they want to go next.



The planning committee will provide updated text for this slide before the conference.

