

FFT Salesforce Reporting Guide

Summary:

This is a step by step guide for how to export and calculate Increase in **Net Income/ Net Worth** and **Bundling services**. The purpose of this document is to assist FOC sites in pulling data from Salesforce to accurately calculate outcomes for reporting. This is in the interim as the FFT Performance Report is being built. If you are unsure of how to do something in this guide please make a note and submit your feedback to fftfocusupport@lisc.org or bring your questions to the Salesforce Support Hours- (every Monday at 1pm CST) Call in information can be found on our website: <http://www.foc-network.org/upcoming-webinars.html>

Increase in Net Income/ Increase in Net Worth:

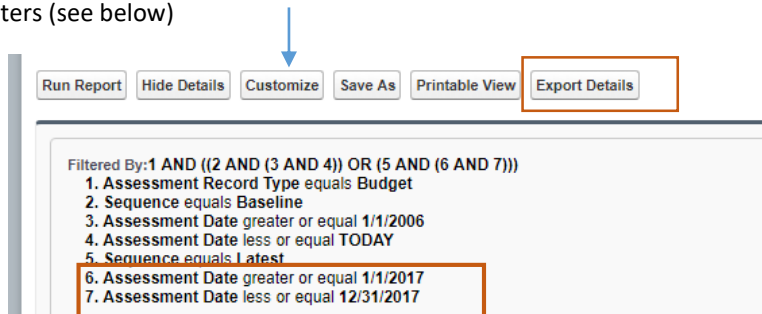
People w/ Net Income-

Report link: <https://lisc.force.com/partners/00036000007CI7i>

People w/ Net Worth-

Report Link: <https://lisc.force.com/partners/00036000007CI9A>

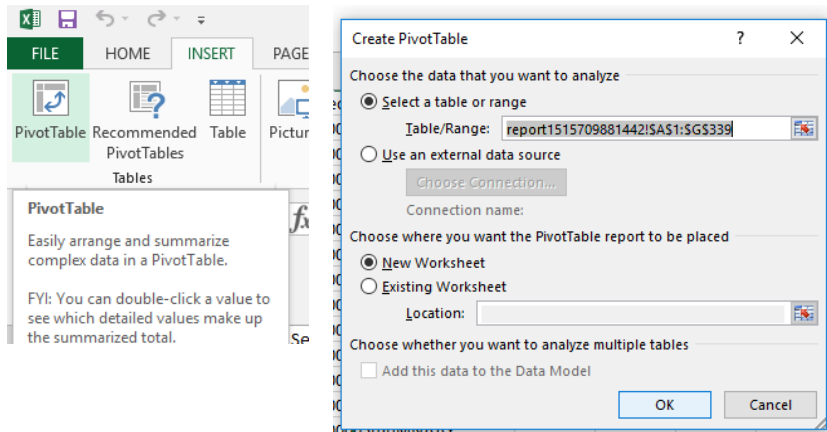
1. Navigate to the report you would like.
2. Customize and edit time frame if needed. Note for these two reports you must customize the time frame within the filters (see below)



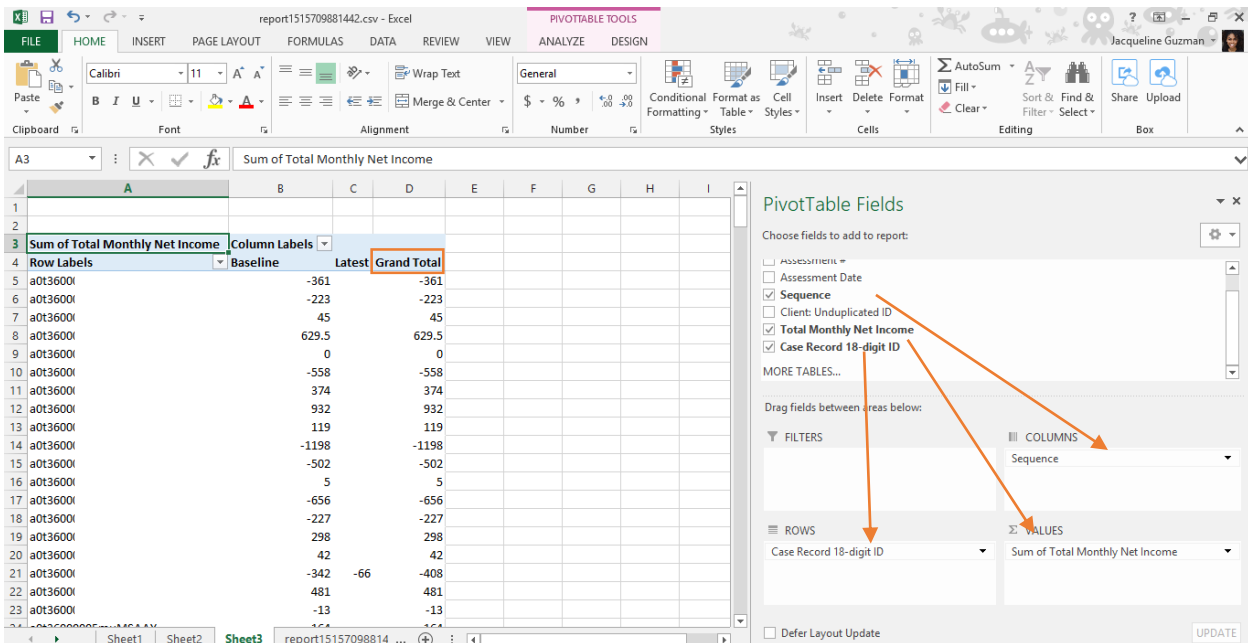
3. Run Report and export details

In Excel:

1. Open the downloaded file
2. Click on the Insert tab, and insert a *Pivot table* into a new worksheet



3. From the *Pivot Table Field box* click and drag the “Case Record 18 digit ID” to Rows, “Sequence” field to Columns and the “Total monthly New income (net worth)” into Values.



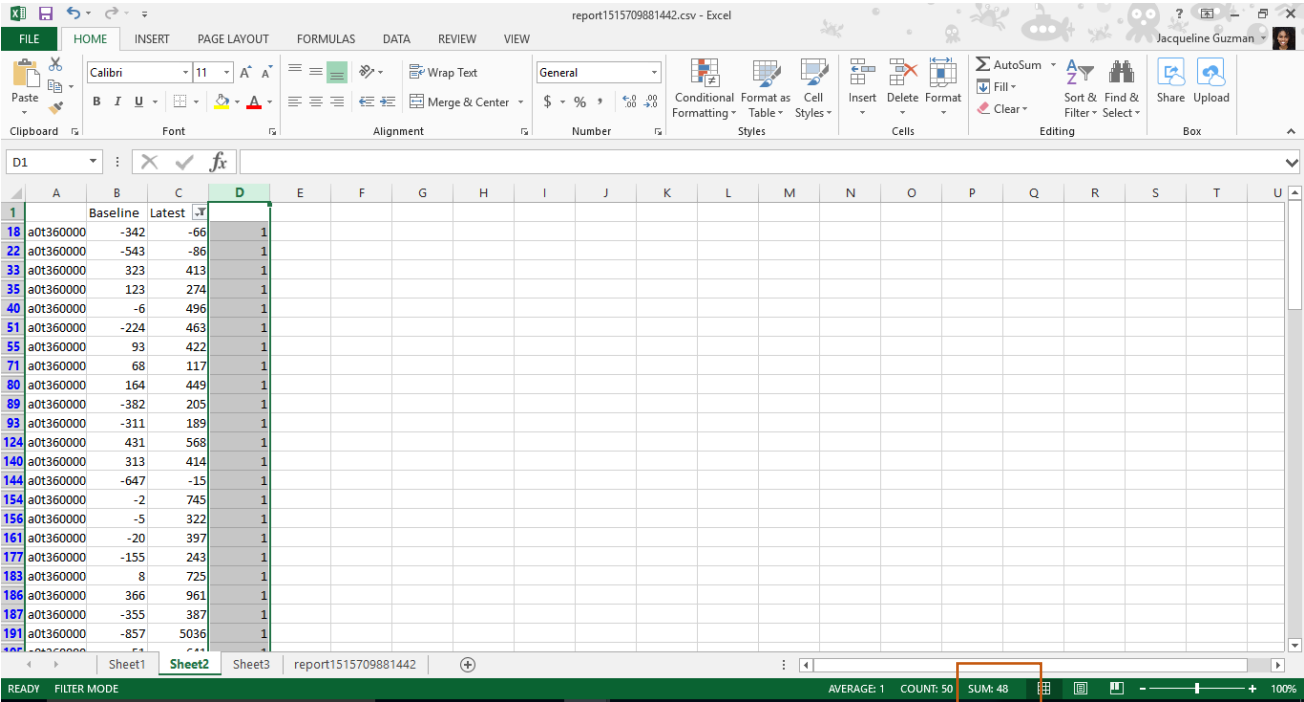
4. Right click “grand total” (column and row) and remove
5. Copy and paste columns A-C to another sheet
6. Filter the “Latest” column so that it removes all the blanks
7. In column D, Enter formula :

=IF((Latest-Baseline)>0,1,"")

Ex. =IF((C18-B18)>0,1,"")

	A	B	C	D	E	F
1		Baseline	Latest			
18	a0t360000	-342	-66	=if((C18-B18)>0,1,"")		
22	a0t360000	-543	-86			

- 8. Expand the formula to all the rows
- 9. Highlight the column with your formula and view the sum. The sum is the number of clients with an increase.



Bundling Services:

People with counseling topics:

Report link: <https://lisc.force.com/partners/00036000007DGLN>

1. Navigate to the report and change time frame in box then run report (if needed). Note for this report you can use the “time frame” box in Salesforce.

Time Frame

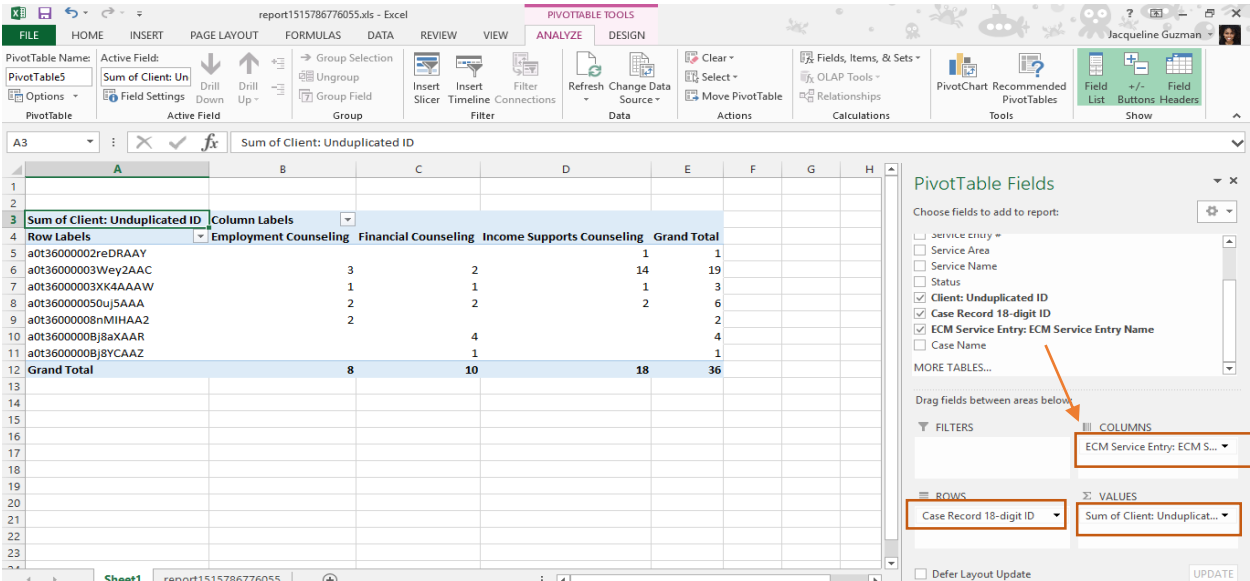
Date Field: Date / Time Range: Custom

From: 1/1/2016 To: 12/31/2018

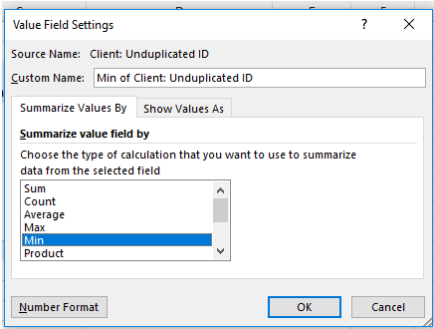
2. Click Run Report and then Export Details

In excel

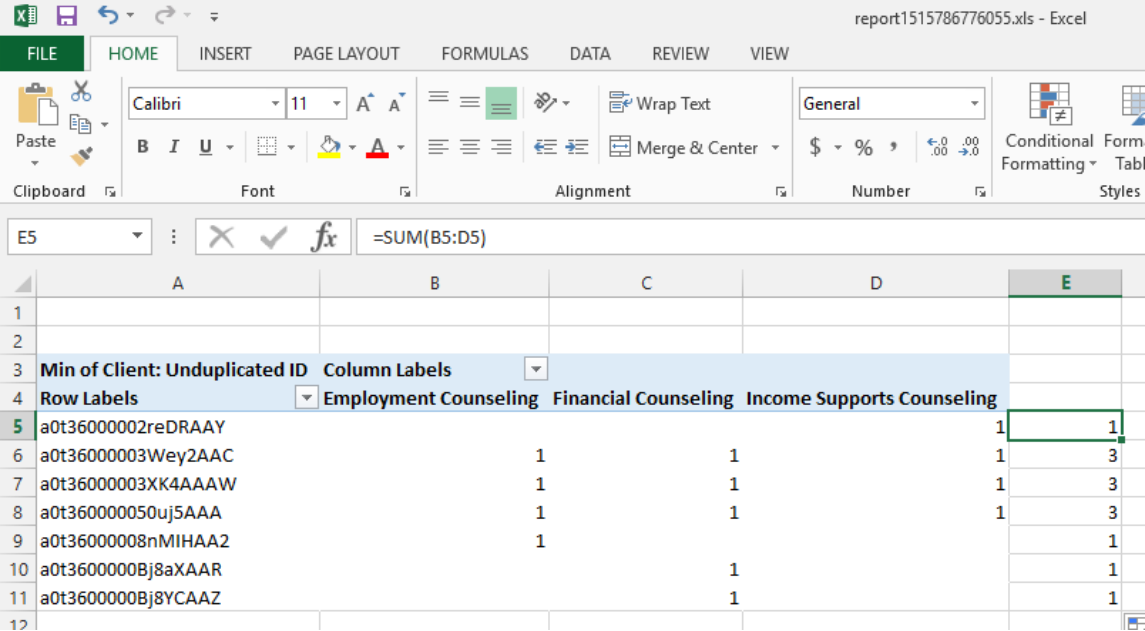
1. Open report and click the Insert tab then Insert *pivot table*
2. In the *Pivot Table Field Box* Click and drag “Case Record 18 digit ID” to Rows, “ECM Service Entry” to Columns and “Client: unduplicated ID” to Values.



3. Click “client: unduplicated ID” in the *pivot table field box* and select “value field setting”
4. Change the summarize value field by to “Min”, ok



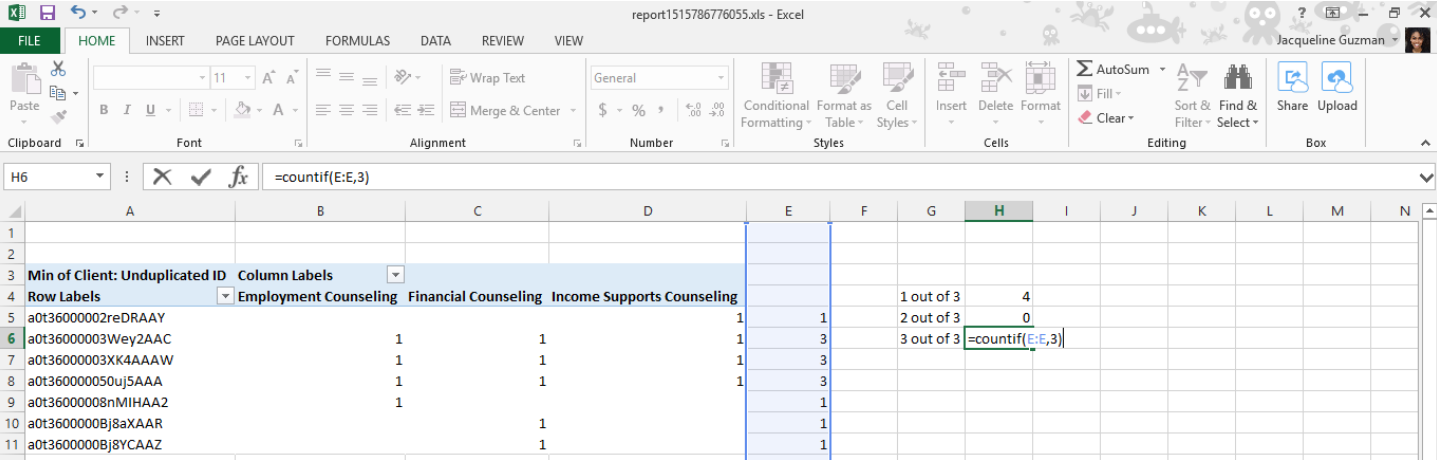
- 5. Delete grand totals
- 6. In column E, find the sum of each row. (EX formula: =sum(B5:D5))



- 7. In a separate column calculate bundling using the count if formula and highlight the row with the sum total (see below) =CountIF formula

Ex.

- 1 out of 3 : =CountIF(E:E,1)
- 2 out of 3: =CountIF(E:E,2)
- 3 out of 3: =CountIF(E:E,3)
- Total= sum(H4:H6)



8. Calculate the percentage- divide each bundling count by that total

- EX. 1 out of 3 = 4
- 2 out of 3 = 0
- 3 out of 3 = 3
- Total = 7

1 out of 3 = $4/7 = 57\%$ OR formula =H4/H7

2 out of 3 = $0/7 = 0\%$ OR formula =H5/H7

3 out of 3 = $3/7 = 43\%$ OR formula =H6/H7

	D	E	F	G	H	I	J	K	L	M	N	O
					Count	Percent						
				1 out of 3	4	57%						
				2 out of 3	0	0%						
				3 out of 3	3	43%						
				Total	7							

9. Bundling is counted if a client is receiving at least 2 out of 3 services. Add 2/3 and 3/3 percentages to get your bundling rate.

Bundling Rate = $0\% + 43\% = 43\%$