Salesforce: Understanding Standard and Customized Reports

November 28, 2017
FOC Network Webinar
1) Standard FOC Reports and Dashboards
2) Customizing Reports
3) Reporting Exercises
**Carolina Rendon** is a Program Officer with LISC’s Family Income and Wealth Building team. She joined the national team last April to lead the Salesforce transition. Carolina supports the FOC network as the Salesforce System Administrator, provides Technical Assistance, and manages the network’s data. Carolina brings over 5 years of experience working with Salesforce. Prior to joining LISC, Carolina worked at Instituto del Progreso Latino (a Chicago FOC) as the Grants Management and Compliance Coordinator.

**Caroline Rendon** is an assistant program officer at LISC Chicago. She supports the Chicago FOCs in their use of Salesforce and data analysis, and works with LISC Chicago’s Data and Evaluation team on measuring program impact across the city. Prior to joining LISC Chicago, Caroline spent five years working in nonprofits on program evaluation, administration, and research.

**Jackie Guzman** is an assistant program officer with LISC’s Family Income and Wealth Building team. She helps support the team with database management and grants/compliance management. In her role she helps monitor the FFT FOC Support email and host the weekly Salesforce support hours. Prior to joining the team she was an AmeriCorps member and later Program coordinator at a Chicago FOC (Jane Addams Resource Corporation).
Standard FOC Reports and Dashboards

Presenter: Carolina Rendon
# Employment Counseling

## Outcome Measures in Salesforce

1. People Placed in Jobs (all types)
2. Average Starting Hourly Wage (unsubsidized)
3. People Achieving Retention (same job)
   3a. People Due for Retention
4. People Working on Employment Counseling Topics

[Dashboard Image]

[Reports Image]
Employment Counseling

FOC Employment Counseling Dashboard - CY 2017 (data displayed based on last refresh)

To see the unduplicated count of participants placed in jobs, please see the details under the report.

Unduplicated count of people placed in jobs: 82

Average Starting Hourly Wage (unsub)
This calculates the average of the starting wage for unsubsidized placements: $13

People Achieving Retention in Same Job
The unduplicated count of people placed in permanent, unsubsidized jobs during the report period and achieving retention milestones in the same job. This does not track continuous retention if a client switches jobs or has multiple jobs.

People Achieving Retention in Same Job
Unduplicated People Achieving A Retention Milestone in Same Job: 44

To see the unduplicated count of participants who have at least one Employment Counseling Story, please see the details under the report.

Unduplicated People with Employment Counseling Topics: 198
Employment Counseling
Employment Counseling

Follow-up exercise to customize

Time Frame
Date Field
Job Start Date
Range
Custom
From
1/1/2017
To
12/31/2017

# of placements

# of people
# Income Support Counseling

## Outcome Measures in Salesforce

1. People Screened for Benefits
2. People Eligible for at Least One Benefit
3. Benefits Applied/Re-applied For
4. Benefits Approved/Re-approved For
5. People Working on Income Supports Counseling Topics
6. Annualized Value of Approved Benefits*

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*This report calculation mistakenly duplicates any recurring benefits approved (or re-approved) more than once during the report period, inflating the total. *Total $ value of approved (or re-approved) Income Supports (annualized value for recurring benefits)*
Income Support Counseling

FOC Income Supports Counseling Dashboard - CY 2017 (data displayed based on last refresh)

People Screened for Benefits

- Unduplicated People Screened (or attempted to screen) for Benefits: 107

Benefits Applied/Re-applied For

- To see the unduplicated count of people who applied (or re-applied) for at least one benefit, see the unduplicated ID count at the bottom of the report.

Income Supports Counseling Topics

- Unduplicated People with Income Supports Counseling Topics: 74

Annualized Value of Approved Benefits*

*This calculation mistakenly duplicates any recurring benefits approved (or re-approved) more than once during the report period, inflating the total. **Total $ value of approved (or re-approved) Income Supports (annualized)  for recurring benefits
Income Support Counseling
Income Support Counseling

[Image of webpage with tables and filters]
Financial Counseling

Outcome Measures in Salesforce

1. People w/ Baseline Financial Assessments
2. People w/ Subsequent Financial Assessments
   2a. People Due for a Credit Report Pull
3. People w/ Action Plans
4. People Working on Financial Counseling Topics
5. People w/ FICO Score Increases*
6. People w/ NI Increases*
7. People w/ NW Increases*

*DASHBOARD

*Report provides a list of clients and the calculations need to be completed outside of Salesforce.
Financial Counseling

FOC Financial Counseling Dashboard - CY 2017 (data displayed based on last refresh)

People w/ Baseline Financial Assessments

- Assessment Record Type: 
  - Balance Sheet: 214
  - Budget: 217
  - Credit Report: 205
  - Financial Health: 216

Undup Total of Baseline Financial Assessments: 220

Calculate FICO Credit Score Improvements

People w/ Subsequent Financial Assessments

- Assessment Record Type: 
  - Balance Sheet: 19
  - Budget: 30
  - Credit Report: 189
  - Financial Health: 15

Undup Total of Subsequent Financial Assessments: 200

Calculate Net Income Increases

Financial Counseling Topics

The list and count of people working on Financial Counseling topics:

Unduplicated People with Financial Counseling Topics: 83

People with Action Plan Starts

Unduplicated People with Action Plan Starts: 11

Calculate Net Worth Increases

Click here to see data to calculate number of people with net worth increases.
Financial Counseling
Financial Counseling

Applicable to the 3 Key Fin Outcomes

<table>
<thead>
<tr>
<th>Case Name</th>
<th>Assessment #</th>
<th>Assessment Date</th>
<th>Sequence</th>
<th>Client Unduplicated ID</th>
<th>Total Monthly Income (net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Record 18-digit ID: a003600i</td>
<td>(1 record)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOC 2/2017 Case Record</td>
<td>Assessment 941555</td>
<td>9/21/2015</td>
<td>Baseline</td>
<td>1</td>
<td>$260.00</td>
</tr>
<tr>
<td>Case Record 18-digit ID: a003600i</td>
<td>(1 record)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOC 2/2017 Case Record</td>
<td>Assessment 941557</td>
<td>10/28/2015</td>
<td>Baseline</td>
<td>1</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Financial Counseling
Financial Counseling
Financial Counseling

Tips to calculate increases:

1. Sort data by Case Record ID
2. Highlight duplicates (red)
3. Filter by color (red)
4. Use a formula to calculate increase

=IF(G22=G21,D22-D21,"")
## Overall Services

### Outcome Measures in Salesforce

1. New Enrollees in FOC

2. People with Counseling Topics (interim bundling)
   - 2a. Employment Counseling
   - 2b. Financial Counseling
   - 2c. Income Supports Counseling

![FOC Overall Services Dashboard](image-url)
Overall Services

FOC Overall Services Dashboard - CY 2017 (data displayed based on last refresh)

- Enrolled data period

- Undup count of new enrollees: 378

- Sum of Client: Unduplicated ID

- ECM Service Entry: ECM Service Entry Name

- Sum of Client: Unduplicated ID

- Employment Counseling: 398
- Financial Counseling: 145
- Income Supports Counseling: 110

- Undup count of People with Counseling Topics: 442
Overall Services

Reports & Dashboards

FOC Overall Services

- At Enrollment Information
- Demographics for FOC enrolled clients
- FOC contact list (for reference)
- New Enrollees in FOC
- People with at least one Counseling SE
- People with counseling topics
- Total # of people with exactly 2/3 types
### Overall Services

#### People with counseling topics

**Report Generation Status**: Complete

**Report Options**:

- **Summarize information by**: ECM Service Entry: ECM Service Entry Name
- **Show**: All case records

**Time Frame**

- **From**: 1/1/2017
- **To**: 12/31/2017

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<table>
<thead>
<tr>
<th>Case Name</th>
<th>Date/Time</th>
<th>Service Entry</th>
<th>Service Area</th>
<th>Service Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Houston</td>
<td>3/17/2017 11:00 AM</td>
<td>ServiceEntry1509</td>
<td>-</td>
<td>Employment Counseling</td>
<td>Education/Training Search</td>
</tr>
<tr>
<td>Houston</td>
<td>3/17/2017 11:00 AM</td>
<td>ServiceEntry1509</td>
<td>-</td>
<td>Employment Counseling</td>
<td>Education/Training Search</td>
</tr>
<tr>
<td>Houston</td>
<td>3/17/2017 7:00 AM</td>
<td>ServiceEntry1509</td>
<td>-</td>
<td>Employment Counseling</td>
<td>-</td>
</tr>
<tr>
<td>Houston</td>
<td>7/26/2017 2:00 PM</td>
<td>ServiceEntry11931</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Case Name</td>
<td>17 Case Record (1 record)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Houston</td>
<td>1/26/2017 5:00 AM</td>
<td>ServiceEntry4026</td>
<td>-</td>
<td>Employment Counseling</td>
<td>Employment Search</td>
</tr>
<tr>
<td>Houston</td>
<td>3/28/2017 8:00 AM</td>
<td>ServiceEntry4026</td>
<td>-</td>
<td>Employment Counseling</td>
<td>Employment Search</td>
</tr>
</tbody>
</table>
Overall Services

Tips to calculate interim bundling (2/3 and 3/3):

1. Make each entry unique by combining the “Case Record 18-digit ID” and the “ECM Service Entry Name”

   \[ A2 \& "_" \& I2 \]

2. Copy column and Paste (values) into a new sheet
Overall Services

Tips to calculate interim bundling (2/3 and 3/3):

On the new sheet:
3. Sort Unique Entries

3a. De-duplicate values

4. Remove the *counseling* text using “Find and Replace” (ctrl+F)

repeat for each counseling entry
leave null
Overall Services

Tips to calculate interim bundling (2/3 and 3/3):

5. Highlight duplicates (red)
5a. Filter by color (red)
6. Copy column and Paste (values) into a new sheet
Overall Services

Tips to calculate interim bundling (2/3 and 3/3):

7. In a new sheet complete a final de-duplication of the data.

8. Count the remaining values.

=COUNTIF(A2:A5,"*"
Bridges to Career Opportunities

<table>
<thead>
<tr>
<th>Outcome Measures in Salesforce</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. People enrolled in BCO (report period)</td>
<td></td>
</tr>
<tr>
<td>1a. People ever enrolled in BCO</td>
<td></td>
</tr>
<tr>
<td>2. People who began a bridge program</td>
<td></td>
</tr>
<tr>
<td>3. People who began an occupational skills training program/college</td>
<td></td>
</tr>
<tr>
<td>degree program</td>
<td></td>
</tr>
<tr>
<td>4. People who completed occupational skills/college</td>
<td></td>
</tr>
<tr>
<td>5. Participants who obtained a credential</td>
<td></td>
</tr>
<tr>
<td>6. Bridge participants placed in jobs</td>
<td></td>
</tr>
<tr>
<td>7. Bridge participants placed in internships</td>
<td></td>
</tr>
<tr>
<td>8. Bridge participants w/ FICO Score Increases*</td>
<td></td>
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<tr>
<td>9. Bridge participants w/ NI Increases*</td>
<td></td>
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<tr>
<td>10. Bridge participants w/ NW Increases*</td>
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</tr>
</tbody>
</table>

*Report provides a list of clients and the calculations need to be completed outside of Salesforce.
Bridges to Career Opportunities

- SIF Term\(^1\) (data displayed based on last refresh)

![Graphs and charts depicting data on program participants and outcomes.](image)

\(^1\) Feb 1 thru Jan 31 of the current year
Bridges to Career Opportunities
Bridges to Career Opportunities
Customizing Reports
Reporting Exercises
Report Builder

1. **Report Type:**
   Joined data source

2. **Preview:**
   Displays of the report (max: 50 records)

3. **Show:**
   Select show “all”

4. **Date Field:**
   Select the applicable date along with the time frame

5. **Fields:**
   Available Data fields

6. **Filters:**
   Narrows down data

7. **Run Report:**
   Click to generate full report count.

5. **To bring a new data field into the report “click and drag” onto the preview section.**
Questions

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Carolina Rendon, crendon@lisc.org
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Jackie Guzman, jguzman@lisc.org

Weekly FFT SF Technical Support Hours:
Every Monday, 1-2p CST, invite lives on the FOC website,
http://www.foc-network.org/
Bring your questions to the support session and review how to enter data in FFT Salesforce.