

REPORTS AND DASHBOARDS AND WAVE ANALYTICS

Two powerful solutions to help you get the most out of your data.



Start with Reports and Dashboards, and extend your investment in Salesforce with Wave Analytics.

To help you deliver insight to your sales and service organizations, Salesforce offers two powerful but different solutions: Salesforce Reports and Dashboards, and Wave Analytics.

Read on to learn how these technologies work together, create new opportunities for your business, and empower your team in different ways.

Salesforce Reports and Dashboards: A real-time view of your team's vital statistics

For many customers, Salesforce is the front office's CRM source of truth. Reports and Dashboards provides real-time transactional reporting built into Salesforce, delivering basic metrics in real time.

With Reports and Dashboards, sales reps and managers get an instant snapshot of everything that matters, including team performance, lead volume, and conversation rates. Thanks to the Salesforce1 Mobile App, sales reps are more productive and can stay connected to customers and teammates, so they're always focused on customer success.

Meanwhile, sales teams work smarter and see dramatic improvements in performance because they're now connected to the right daily business metrics, information, and colleagues.

How to use Reports and Dashboards:

- ✓ **Sales Cloud** – View your team leaderboard, see if you hit your quota, and track daily activity.
- ✓ **Service Cloud** – Identify cases that are high priority, and which tickets get logged the most.
- ✓ **Across Salesforce** – Create custom reports and dashboards to track performance across your Salesforce data.

Build reports without help from IT.

Stay updated with customized reports that you can build with ease. Just drag and drop the fields, filters, groupings, and charts that you want, and get an immediate real-time view.

Modify charts in your report, on the same screen.

Sales managers can track team performance and quickly make changes to dashboard components to get the most info front-and-center.

Make critical decisions from anywhere.

Use the Salesforce1 Mobile App to check on key business metrics from anywhere. From email and opportunity management to tasks and collaboration, get what you need to close deals faster, on any device.

Wave Analytics: The best analytics for Salesforce users

Wave Analytics goes beyond the operational reporting of Reports and Dashboards to let you ask questions, get answers, and take action to move your sales, service, and marketing business forward. With its large dataset capacity (supports hundreds of millions of rows), and super-fast query and response times, Wave Analytics is a purpose-built suite of apps to help you get the most out of your data.

Perhaps most importantly, Wave Analytics is native to Salesforce, so it supports multiple Salesforce orgs and unlimited Objects. Augment external data from ERP, order, and inventory systems, and embed Wave Analytics in the business process where the user lives. Unlike disconnected analytics technologies, Wave Analytics delivers dynamic charts and visualizations which help you to quickly turn powerful insight into action. And because it's built mobile-first, you can gain insight and take action from anywhere, on any device. There's no faster way to pull smart ideas out of data, and put them to work.

How to use Wave Analytics:

- ✓ **Sales** – Get end-to-end pipeline visibility, uncover white space and new upsell opportunity, and spot year-over-year trends to determine where to invest resources to close bigger deals and grow your business.
- ✓ **Service** – Compare product usage with case history to understand how you can deliver better service and retain customers.
- ✓ **Marketing** – Build better campaigns, see website logs alongside pipeline, and track how your latest initiatives are doing. Gain stronger understanding of the success of your overall strategy.

Unlock critical sales and service insights.

Wave Analytics is native to Salesforce. So you can find hidden insights and sales opportunities in your business and customer data that you can take action on, right from within Salesforce.

Make smarter decisions.

Access AI-powered insights and recommendations from within Sales Cloud or Service Cloud. Understand what's happening, why, and what to do about it.

Explore any data quickly.

Automatically analyze millions of data combinations in minutes. You can even automate your entire CRM analytics workflow with Einstein AI, now on Wave Analytics.

Take action wherever you are.

With a mobile-first design, you can explore your data – and take action – from anywhere, at anytime.

Key Differences	Reports and Dashboards	Wave Analytics
What it is	Operational reporting on Salesforce data to get a snapshot of CRM	A platform used to explore any data and ask new questions
Used for	Basic metrics	Visualize complex KPIs and self-service analytics
Experience	Real-time reports and dashboards	Interactive data exploration on any device
Data	Salesforce only	Data from Salesforce and other external data sources
Historical	90-day analysis	Year-over-year historical analysis and trending

Frequently Asked Questions:

Is there a better way to join reports?

Yes. Check out our dataset builder that lets you combine disparate objects such as campaign, lead, and opportunity.

How can I create formulas without first creating Visualforce objects?

Try data prep and recipes for a powerful UI formula.

I'd like to create something more robust and less time-consuming than a snapshot report. Any suggestions?

Try Trend in Wave Analytics to automatically trend custom and standard objects with ease.

Forecasting is great, but it's hard to figure out exactly which deals have been pushed out or pulled in from week to week. What can I do to change that?

Try the Sales Wave Analytics app, now with collaborative forecasting, to replace your dozens of dashboards and reports. Your sales team will love it.

We have hundreds of reports, and each one seems like it has its own naming convention, making it difficult to find anything. How can we combine and organize all of that great data?

Use Wave Analytics apps to replace hundreds of individual reports with a 10,000-foot view of your business that you can slice and dice any way you like.

Reports and Dashboards has a three-filter limit. What if I want more filters?

With Wave Analytics, filter all you want.

How do I perform cross-object analyses?

With standard reports and dashboards, you can analyze up to three objects. With Wave Analytics, you can get interactive analytics on an unlimited number of objects.

Thanks for your interest in Reports & Dashboards and Wave Analytics.

To learn more about what's under the hood of the Wave Analytics platform, please visit www.salesforce.com/analytics-cloud/technology.

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