

DESIGNING DASHBOARD MOCKUPS AS A SALESFORCE PROFESSIONAL

A CLICKED PROJECT BY JOSH MAYNARD



hello

SLIDE 01

STEP 1 - DEFINE PARAMETERS

We received this information from the live interview with “Erin”, and the notes she took. Based on that, the most crucial Dashboard Elements are as follows:

REAL TIME UPDATES

Vital for keeping attendees informed and engaged.

ATTENDEE BEHAVIOR

This data is valuable for event managers.

TWO-WAY COMMUNICATION

Showcases how attendees can interact with the app to make changes or receive info.

AUTOMATED TASKS

Highlights how the app can automate repetitive tasks like password resets can show the efficiency gains from using the app.

COMPLIANCE & OPT-IN

Shows how the app requires explicit opt-ins for notifications.

Ask Mallory!
(or Erin?)

STEP 2 - CREATE MOCK DATA CSV FILES FOR IMPORT



In order to emulate this process, we will need to generate some mock data for the dashboards and reports to look at. **The field names and data types must correspond to the Objects and Fields created in the next step!**

Activity_ID	Activity_Type	Status	Timestamp
1	Email	Sent	9/1/2021 12:00
2	Call	Completed	9/1/2021 12:30
3	Meeting	Scheduled	9/2/2021 9:00

< --- Real-Time Updates Mock Data

Campaign_ID	Opportunity_ID	Amount	Status
C1	O1	5000	Closed
C2	O2	3000	Open
C3	O3	7000	Closed

< --- Attendee Behavior Mock Data

Email_ID	Subject	Status	Timestamp
E1	Welcome	Sent	9/1/2021 10:00
E2	Session Update	Sent	9/1/2021 11:00
E3	Feedback Request	Pending	9/2/2021 13:00

< --- Two-Way Communication Mock Data

Case_ID	Type	Status	Priority
CA1	Password Reset	Closed	Low
CA2	Schedule Assistance	Open	High

< --- Automated Tasks Mock Data

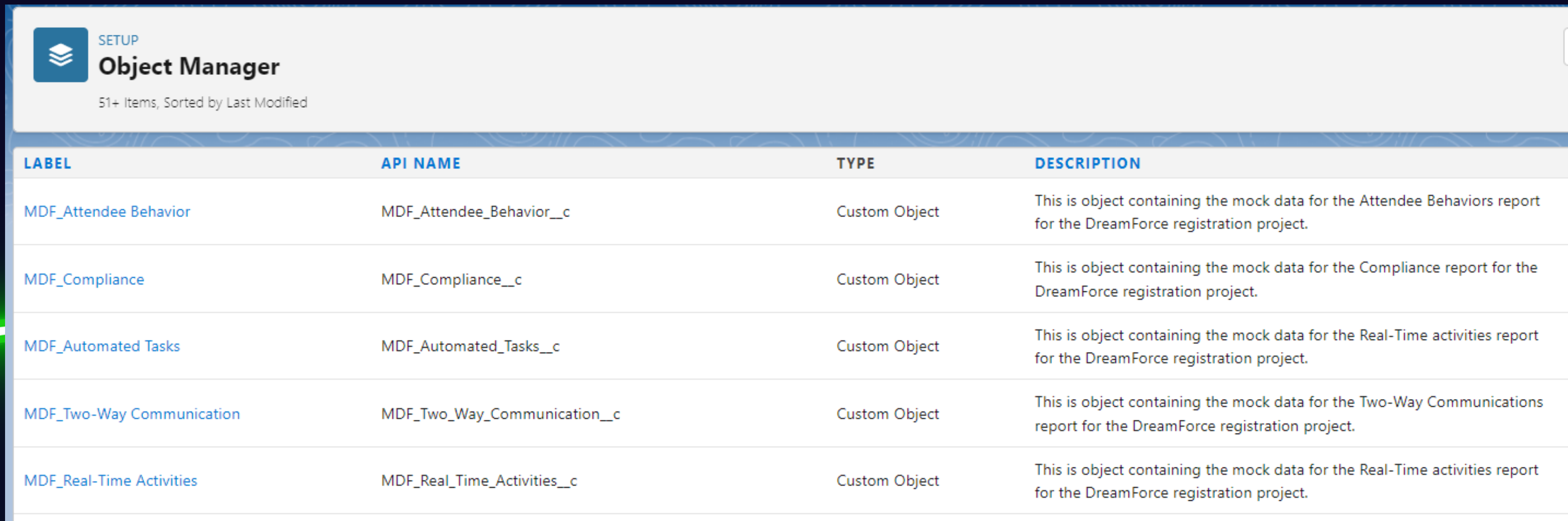
Contact_ID	Name	Opted_In_For_Notifications	GDPR_Compliant
CO1	Alice	Yes	Yes
CO2	Bob	No	Yes
CO3	Carol	Yes	No

< --- Compliance Mock Data

NOTE: In the real world, "Real-Time Activities" data could come from an event management system, while "Attendee Behavior" could be sourced from a CRM system, and "Two-Way Communication" could be pulled from an email marketing platform. **I did exactly none of this.** Yay!

STEP 3A - CREATE OBJECTS IN SALESFORCE

These are the custom objects the mock data will be imported into. I have named them all "MDF_NameOfDataFile" to keep things straight, and made sure to include a description of each for later reference if necessary.



The screenshot shows the Salesforce Object Manager interface. At the top left, there is a 'SETUP' icon and the text 'Object Manager' with a subtext '51+ Items, Sorted by Last Modified'. Below this is a table with four columns: LABEL, API NAME, TYPE, and DESCRIPTION. The table lists five custom objects, each with a unique API name and a descriptive text.

LABEL	API NAME	TYPE	DESCRIPTION
MDF_Attendee Behavior	MDF_Attendee_Behavior__c	Custom Object	This is object containing the mock data for the Attendee Behaviors report for the DreamForce registration project.
MDF_Compliance	MDF_Compliance__c	Custom Object	This is object containing the mock data for the Compliance report for the DreamForce registration project.
MDF_Automated Tasks	MDF_Automated_Tasks__c	Custom Object	This is object containing the mock data for the Real-Time activities report for the DreamForce registration project.
MDF_Two-Way Communication	MDF_Two_Way_Communication__c	Custom Object	This is object containing the mock data for the Two-Way Communications report for the DreamForce registration project.
MDF_Real-Time Activities	MDF_Real_Time_Activities__c	Custom Object	This is object containing the mock data for the Real-Time activities report for the DreamForce registration project.



STEP 3B - FIELDS OF THE CUSTOM OBJECTS

SETUP > OBJECT MANAGER
MDF_Real-Time Activities

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Activity_ID	Activity_ID__c	Text(1)
Activity_Type	Activity_Type__c	Picklist
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
MDF_Real-Time Activities Name	Name	Text(80)
Owner	OwnerId	Lookup(User.Group)
Status	Status__c	Picklist
Timestamp	Timestamp__c	Date/Time

SETUP > OBJECT MANAGER
MDF_Two-Way Communication

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Email_ID	Email_ID__c	Text(2)
Last Modified By	LastModifiedById	Lookup(User)
MDF_Two-Way Communication Name	Name	Text(80)
Owner	OwnerId	Lookup(User.Group)
Status	Status__c	Picklist
Subject	Subject__c	Text(20)
Timestamp	Timestamp__c	Date/Time

Setup Home Object Manager

SETUP > OBJECT MANAGER
MDF_Attendee Behavior

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Amount	Amount__c	Currency(18, 0)
Campaign_ID	Campaign_ID__c	Text(2)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
MDF_Real-Time Activities Name	Name	Text(80)
Opportunity_ID	Opportunity_ID__c	Text(2)
Owner	OwnerId	Lookup(User.Group)
Status	Status__c	Picklist

SETUP > OBJECT MANAGER
MDF_Automated Tasks

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Case_ID	Case_ID__c	Text(6)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
MDF_Automated Tasks Name	Name	Text(80)
Owner	OwnerId	Lookup(User.Group)
Priority	Priority__c	Picklist
Status	Status__c	Picklist
Type	Type__c	Picklist

SETUP > OBJECT MANAGER
MDF_Compliance

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Contact_ID	Contact_ID__c	Text(3)
Created By	CreatedById	Lookup(User)
GDPR_Compliant	GDPR_Compliant__c	Checkbox
Last Modified By	LastModifiedById	Lookup(User)
MDF_Compliance Name	Name	Text(80)
Name	Name__c	Text(15)
Opted_In_For_Notifications	Opted_In_For_Notifications__c	Checkbox
Owner	OwnerId	Lookup(User.Group)



STEP 4 - USE THE DATA IMPORT WIZARD



Map the fields in the CSV files to the corresponding fields in the Salesforce custom objects you've created



Data Import Wizard

[Help for this page](#) ?

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	MDF_Two-Way Communication	3	0	0	09-04-2023 06:50	58
Closed	MDF_Real-Time Activities	3	0	0	09-04-2023 06:49	72
Closed	MDF_Compliance	3	0	0	09-04-2023 06:48	68
Closed	MDF_Automated Tasks	2	0	1	09-04-2023 06:48	70
Closed	MDF_Attendee Behavior	3	0	0	09-04-2023 06:46	85

WATCH OUT FOR ERRORS!

Bulk Monitoring



STEP 5 - CREATE THE REPORTS

When selecting report type, just type MDF, and all the objects you created earlier are available for selection. Super easy! We love easy.

Mock Dream Force

Search...

MDF App MDF_Real-Time Activities MDF_Compliances MDF_Two-Way Communications MDF_Automated Tasks MDF_Attendee Behaviors Reports Dashboards

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Quotes

Individuals

Other Reports

Hidden Report Types

Select a Report Type

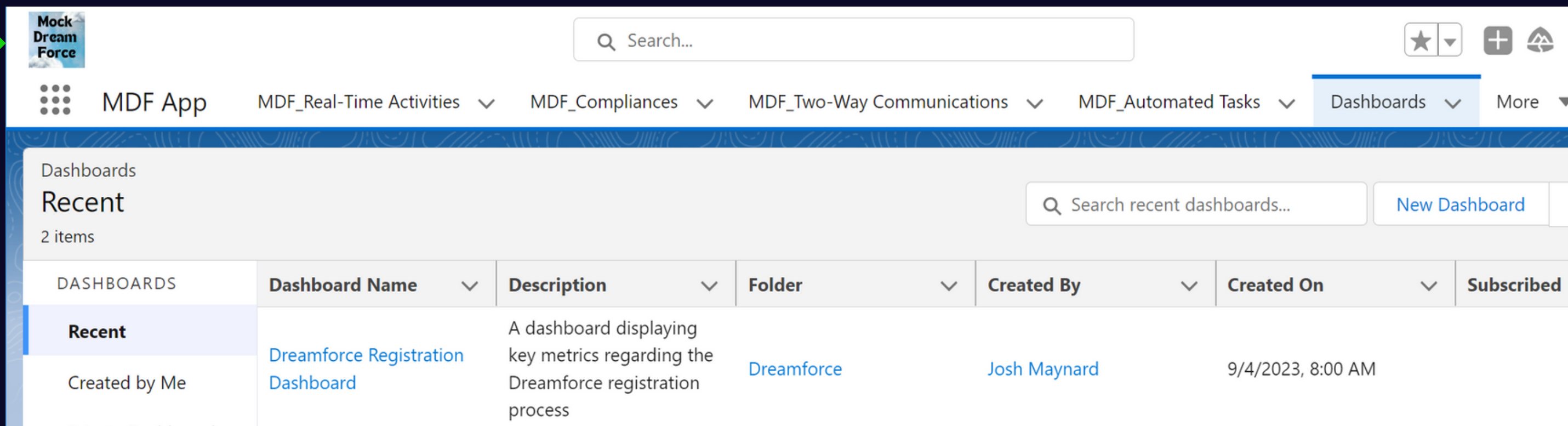
Search: MDF

Report Type Name	Category
Activities with MDF_Real-Time Activities	Standard
Activities with MDF_Attendee Behaviors	Standard
Activities with MDF_Two-Way Communications	Standard
Activities with MDF_Automated Tasks	Standard
Activities with MDF_Compliances	Standard
MDF_Real-Time Activities	Standard
MDF_Real-Time Activities History	Standard
MDF_Attendee Behaviors	Standard
MDF_Attendee Behavior History	Standard
MDF_Two-Way Communications	Standard
MDF_Two-Way Communication History	Standard
MDF_Automated Tasks	Standard
MDF_Automated Tasks History	Standard
MDF_Compliances	Standard
MDF_Compliance History	Standard



STEP 6 - ADD THE REPORTS TO THE DASHBOARD

All of the reports and the dashboard are held in a folder called "Dreamforce", just to keep things clean. Same thinking for collecting it all into its own Salesforce App.

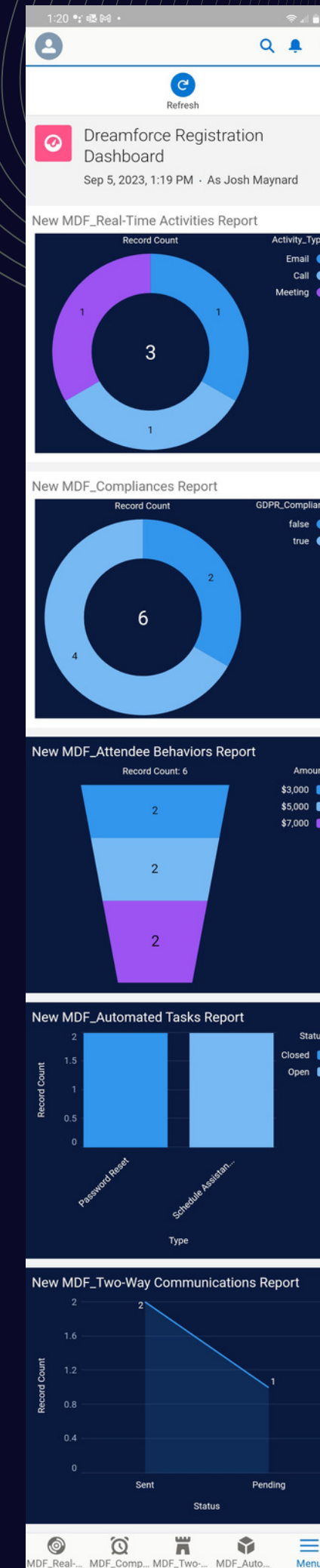
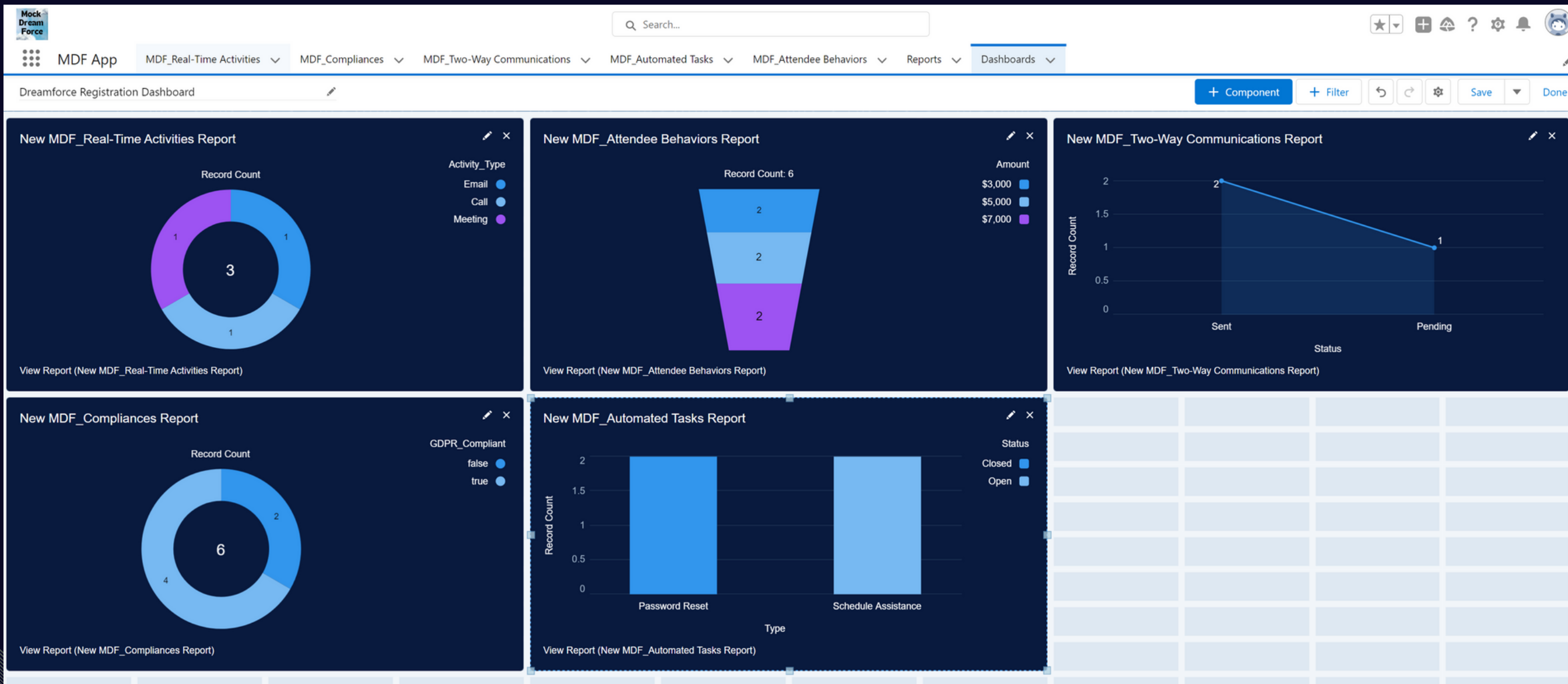
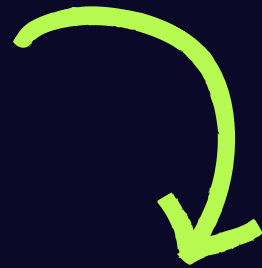


The screenshot shows the Salesforce interface for the MDF App. At the top, there is a search bar and navigation tabs for various app features. The 'Dashboards' tab is selected, showing a list of recent dashboards. A table lists the dashboard details, including its name, description, folder, creator, and creation date.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dreamforce Registration Dashboard	A dashboard displaying key metrics regarding the Dreamforce registration process	Dreamforce	Josh Maynard	9/4/2023, 8:00 AM	

STEP 7 - PEEP THE DASHBOARDS ON BOTH DESKTOP AND MOBILE

DESKTOP



MOBILE



THANKS

FOR THE PAST 3 MINUTES

A PDF of this presentation will be available on my Salesforce portfolio:

www.tinyurl.com/Josh-Maynard-Portfolio



[add me on linkedin plz](#)