Introduction SFDC & Qlikview

Overview

In this section, you will find information about:

- General differences between SalesForce and Qlikview
- Which reports are available to whom ?

Concerned profiles:

ALL

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Step By Step

Why do we need Reports & Dashboards in SFDC?

-A lot will be expected from the sales reps in terms of **input** into the CRM system, and without reports (and dashboards) the sales rep may find it difficult to understand **the outcome of his input**, and where he is in terms of the maintenance of the database
-**Individual and team objectives** (like number of visits, management of the pipeline, etc.) need to be monitored and dashboards will help the sales rep and managers to estimate progress towards these objectives and monitor activities regularly
-On top of existing reports and dashboards, personal reports and dashboards can be created. They will help the sales rep to anticipate certain results management may see, in their own dashboards or in the Qlik analytics. Note that they are **real-time in Salesforce** (while Qlik isn't)
->The Salesforce reports and dashboards are a day-to-day tool that should encourage the sales rep's behaviour and guide him in his tasks, as well as Key Account Managers, BDM, etc.

Other advantages:

-These dashboards are **easily cutsomizable** by anyone with the right training and access within the GBU (not dependent on "developement" by IT).

Two types of reports are available, SFDC reports & QlikView Reports, with different visibility models

Collaboration tool
- **Input** data
- **Monitor** activity with customers
- **Collaborate** within commercial community
- **Source:** SFDC data (real-time)

Opportunities
- Visibility on all opportunities (even those of other GBUs provided are not confidential)

Sales performance
- Not visible

- Not visible

Visit Reports
- Visibility on all opportunities (even those of other GBUs provided are not confidential)

Analytical tool
- **Vizualize** data to manage the business
- **Analyse** data through filters
- **Source:** SFDC data and SAP (daily synchro)

Opportunities
- Visibility only on the opportunities of my GBU

Sales performance
- Full visibility of info from my GBU
- Visibility only revenues of other GBUs

Order book/Sold & Pending
- Full visibility of info from my GBU

Visit Reports
- Limited to no visibility

What reports are available to whom today?

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d

ay, several reports are already available in the system. In addition, the Project Team is working on collecting and pri

Profiles

	SFDC		QlikView
Sales	**Sales Reps Dashboard**	Dashboard allows me to pilot activities in one glance : • Customer visits & visit reports • Complaints & Customer requests* & Sample requests*, • Opportunities & quotes* • Tasks → You can see only your own activities & figures	**Order Book** **Sales Performance** **Overdue & DSO** **Opportunities**
Sales Managers / BDM / KAM	**Sales Manager dashboards**	Dashboards allowing managers to pilot activities in one glance for the team (N-1): Customer visits & visit reports, complaints, Opportunities, etc.	
	BDM Dashboard	Designed or Business Development Managers to manage and monitor opportunities linked to their area of responsibility	
	KAM Dashboard	Manage and monitor activities and records in Salesforce linked to Key Accounts of the GBU	
	Adoption dashboards (2 in total)	Dashboard allowing to follow the adoption of the system in the GBU / Region in terms of logins, creation of objects, management of objects	
	PDCR Dashboard	Dashboard showing the PDCR objectives in terms of logins & object creation	

*Available with Release 4.0.

oritizingneedsfornewreports(e.g.forsampleandcustomerrequests)tohaveamorecompletepicture.	
Toda	

y, several reports are already available in the system. In addition, the Project Team is working on collecting and prio

Profiles

Cust.Service, Quality, Prod.

Others

	SFDC	QlikView
Complaints dashboards	Complaints by step, open complaints by month	**Complaints**
Quality Dashboards (used by CRM Champions)	Monitor the quality of records entered in Salesforce, with a focus on opportunities, visits & visit reports.	

ritizing needs for new reports (e.g. for sample and customer requests) to have a more complete picture.	

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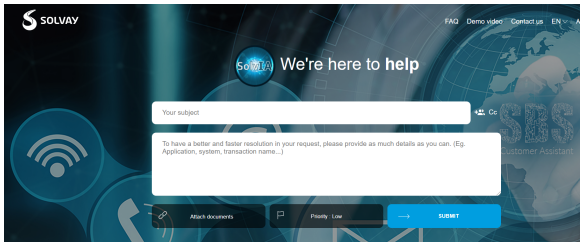
Related articles

Need help?

- Qlikview - Analytics
- Reporting in SFDC - Definition
- Reporting in SFDC – Create reports in SFDC
- Reporting in SFDC - Viewing existing dashboards in SFDC (depends on profile)
- Reporting on GBU Segmentation Fields in SFDC.

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



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