

Reporting on GBU Segmentation Fields in SFDC.

Overview

Table of content

In this section, you will find information about:

- How to create a report based on GBU segmentation
- How to delete a request

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Concerned profiles:

Sales - Marketing

Step By Step

The screenshot shows the Salesforce interface for Reports & Dashboards. At the top, there's a navigation bar with tabs for Home, Chatter, Accounts, Contacts, Activities, Visit Reports, Account Plans, Cases, Opportunities, Competitive Insights, Competitors, Cross BU Leads, Analytics, Reports (active), Dashboards, and Sample Requests. Below this, the 'Reports & Dashboards' section has two buttons: 'New Report...' (highlighted with a red box) and 'New Dashboard...'. On the left, there's a 'Folders' sidebar with a search bar and a list of folders. The main area shows a table of reports with columns for Action, Name, Folder, and Created By. The first report is 'Opportunity Products with Market Segment' in the 'Opportunities' folder, created by 'Cano, Christian'.

- The user can make Reports on the Opportunities with Products and use as dimensions

on the GBU Segment at ion fields. In order to do so, the user clicks on the **R e p o r t s** tab and then clicks on the **N e w R e p o r t** button.

• The user chooses Opportunities with Products Report Type and clicks on the Create button.

Create New Report

Select Report Types to Hide

Quick Find

Accounts & Contacts

Opportunities

Opportunities and Cross BU Lead

Opportunities and End Use

Opportunities and Account Plan

Opportunities and GBU

Opportunities and BU Region

Opportunities and Template Language

Opportunities with Products

Opportunities with Products and Cross BU Lead

Opportunities with Products and End Use

Opportunities with Products and Account Plan

Opportunities with Products and GBU

Opportunities with Products and BU

Opportunities with Products and BU Region

Preview

Opportunity - Product Report

Price	Product Name		Service Plans		Grand Total
Opportunity Stage	Generators	Widgets			
Qualification	\$125,000	\$75,000	\$115,000		\$315,000
Need Analysis	\$350,000	\$67,000	\$89,000		\$506,000
Negotiations	\$230,000	\$43,000	\$65,000		\$338,000
Grand Total:	\$705,000	\$185,000	\$269,000		\$1,159,000

Cancel

Create

• The user clicks on Show Details and then clicks on Remove All Columns

Report Type: Opportunities with Products

Unsaved Report

Guided Tour | View Tutorial | Help for this Page

Save Save As Close Report Properties Add Report Type Run Report

Fields Add

Quick Find

Drag and drop to add fields to the report

Bucket Fields

Opportunity Information

Created By

Created Alias

Last Modified By

Opportunity Name

Type

Opportunity Record Type

Lead Source

Primary Partner

Opportunity Currency

Amount

Amount (converted)

Closed

Won

Close Date

Close Date (2)

Last Stage Change Date

Next Step

Stage

Probability (%)

Fiscal Period

Age

Stage Duration

Forecast Category

Filters Add

Show All opportunities

Opportunity Status Open

Probability All

Filter Language English

Date Field Close Date

Range Current FQ

From 1/1/2016

To 31/3/2016

To add filters, click Add

Preview Tabular Format Show Remove All Columns

Opportunity Name	Type	Amount	Close Date	Stage	Probability (%)	Created Date	Product Name	Quantity	Target Unit Price	Target Unit Price (converted)
TEST PRE	-	EUR 2,000.00	5/01/2016	1 - Qualify	20 %	5/01/2016	RHODAMEEN T 201	1	EUR 0.00	EUR 0.00
TEST PRE	-	EUR 2,000.00	5/01/2016	1 - Qualify	20 %	5/01/2016	RHODAMEEN T 201	1	EUR 2,000.00	EUR 2,000.00
TEST PRE 2	-	EUR 50.00	20/01/2016	1 - Qualify	20 %	5/01/2016	TESTPRODUCT	1	EUR 50.00	EUR 50.00
In-Per Product Sales 2	-	EUR 472,500.00	26/03/2016	2 - Sample Testing	30 %	19/01/2016	test for demo	1	EUR 472,500.00	EUR 472,500.00
In-Per Product Sales 2	-	EUR 472,500.00	26/03/2016	2 - Sample Testing	30 %	19/01/2016	test for demo	1	EUR 0.00	EUR 0.00
test ashish	-	CDK 0.00	5/01/2016	1 - Qualify	20 %	14/01/2016	TESTPRODUCT	1	CDK 0.00	CDK 0.00
ef	-	-	5/01/2016	1 - Qualify	20 %	5/01/2016	-	-	-	-
ef	-	EUR 1,221.00	5/01/2016	1 - Qualify	20 %	7/01/2016	(RR) METHYL DIPHOS	1	EUR 1,221.00	EUR 1,221.00
ef	-	EUR 1,221.00	5/01/2016	1 - Qualify	20 %	7/01/2016	TECHNYL A 118 V50 BLACK S1	1	EUR 0.00	EUR 0.00
ef	-	-	5/01/2016	1 - Qualify	20 %	20/01/2016	-	-	-	-
4594	-	EUR 14,140.00	13/01/2016	1 - Qualify	20 %	13/01/2016	TESTPRODUCT	1	EUR 14,140.00	EUR 14,140.00
4594	-	-	13/01/2016	1 - Qualify	20 %	13/01/2016	-	-	-	-
4594	-	EUR 14,140.00	13/01/2016	1 - Qualify	20 %	13/01/2016	TESTPRODUCT	1	EUR 14,140.00	EUR 14,140.00
jijcdthn	-	-	12/01/2016	1 - Qualify	20 %	6/01/2016	-	-	-	-
jijcdthn	-	-	12/01/2016	1 - Qualify	20 %	14/01/2016	-	-	-	-
enjherry	-	EUR 25,536.00	8/01/2016	2 - Negotiate	50 %	8/01/2016	TESTPRODUCT	1	EUR 25,536.00	EUR 25,536.00

• For

om the left pane, the user can then add relevant columns such as Opportunity Name, Product Name, Market, Segment, Application

Report Type: Opportunities with Products

Unsaved Report

Guides Tour | Video Tutorial | Help for this Page

Save | Save As | Close

Report Properties | Add Report Type | Run Report

Fields

Filter: All opportunities

Filter Language: English

Opportunity Name contains "chris, aroma, ep"

Opportunity Status: Open

Probability: All

Opportunity Name

Product Name

Market

Segment

Application

End Use

GBU Segmentation 1

GBU Segmentation 2

Chris Opportunity

Dummy Product EP

Automotive

Lightweighting

External Parts

Waste Water Treatment Vehicle Use

Production

MLB & MLB Equipment's Parts

Chris Opportunity

Dummy Product EP

-

-

-

-

-

-

Chris Opportunity

Dummy Product EP

Automotive

Lightweighting

External Parts

External Door Handles

External Parts

Lightweighting

Chris Opportunity

Dummy Product EP

-

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Opportunity Aroma

TESTPRODUCT

Food

Flavor & Flavor Formulation

Flavor

Beverages/ Hot Tea

Flavor

Flavor & Flavor Formulation

Opportunity Aroma 3

TESTPRODUCT

Food

Flavor & Flavor Formulation

Flavor

Sweet Goods/ Bakery/ Biscuits

Flavor

Flavor & Flavor Formulation

Opportunity Aroma 4

TESTPRODUCT

Food

Flavor & Flavor Formulation

Flavor

Health Care

Flavor

Flavor & Flavor Formulation

Opportunity Aroma 4

TESTPRODUCT

Food

Flavor & Flavor Formulation

Flavor

Dairy Others

Flavor

Flavor & Flavor Formulation

Opportunity Aroma 4

TESTPRODUCT

Food

Flavor & Flavor Formulation

Flavor

Beverages/ Concentrates

Flavor

Flavor & Flavor Formulation

Opportunity Aroma 4

test for demo

Food

Flavor & Flavor Formulation

Flavor

Beverages/ Water

Flavor

Flavor & Flavor Formulation

Opportunity EP

TESTPRODUCT

Automotive

Lightweighting

External Parts

Sun Roof Frame

External Parts

Lightweighting

Opportunity EP 2

TESTPRODUCT

Consumer Goods

Sports & Leisure

Battery (Non Auto)

Bicycle

Battery (Non Auto)

Sports & Leisure

Opportunity EP 3

TESTPRODUCT

Industrial Applications

Industrial Equipment

Industrial Equipment Parts

Attachments Tailor

Industrial Equipment Parts

Industrial Equipment

Grand Totals (3 records)

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Market Segmentation - Delete a Request

•What if a Request needs to be deleted ?

Only the Administrator can delete a Request. If a Request is erroneous, that simply rejecting the Request is not sufficient and needs to be completely deleted from the system, a « Need Help » needs to be created to request this from the Support Team.

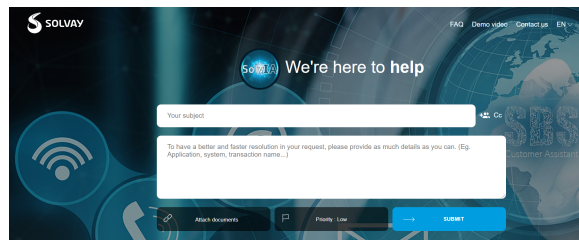
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Related articles

- [Market Segmentation: Presentation](#)
- [Requesting a New End-Use](#)
- [Requesting a Change to a Corporate Segmentation](#)
- [Create a New Opportunity](#)
- [Reporting in SFDC – Create reports in SFDC](#)

Need help?

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/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example