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

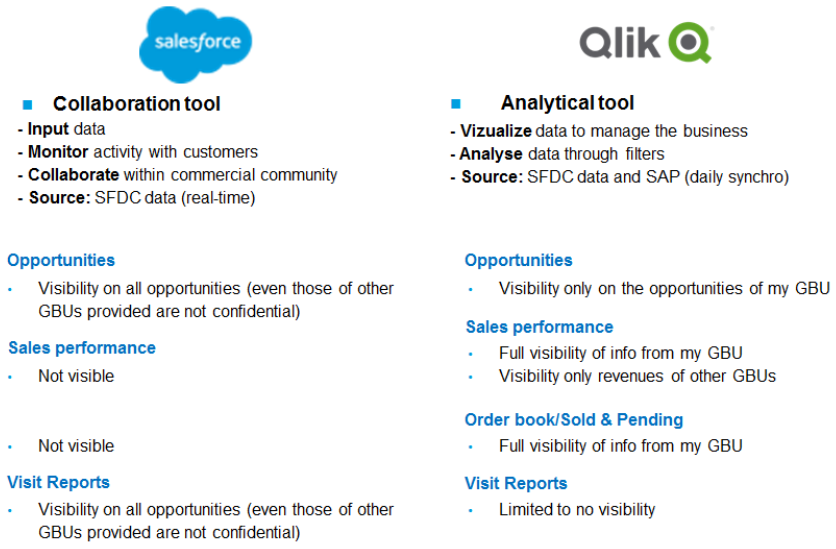
Why do we need Reports & Dashboards in SFDC?

-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



What reports are available to whom today?

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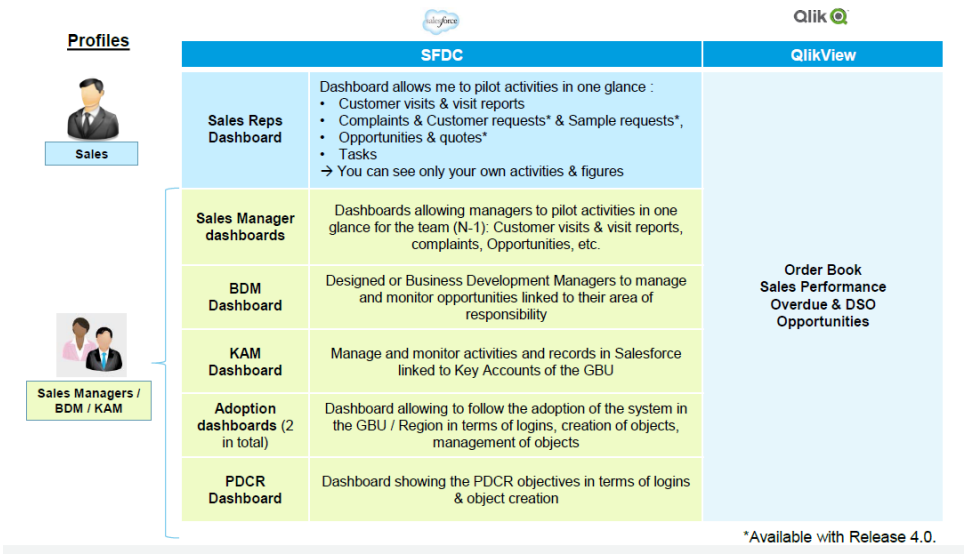

Profiles	SFDC		QlikView
Sales	Sales Reps Dashboard	Dashboard allows me to pilot activities in one glance : • Customer visits & visit reports • Complaints & Customer requests* & Sample requests*, • Opportunities & quotes* • Tasks → You can see only your own activities & figures	Order Book Sales Performance 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

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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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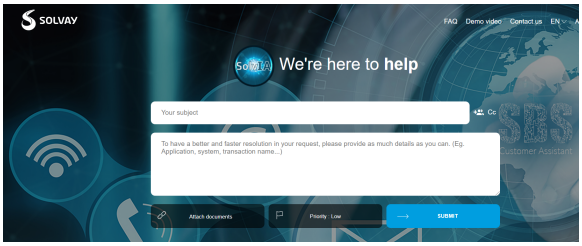
Related articles

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/



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