

Reporting in SFDC - Viewing existing dashboards in SFDC (depends on profile)

Overview

In this section, you will find information about how to view, create and refresh a dashboard. You will also see where to find the dashboard for the sales representatives and the sales managers.

Concerned profiles:

ALL

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Step By Step

How to find Dashboards

The screenshot shows the Salesforce navigation menu with the 'Dashboards' tab highlighted. Below the menu, there is a search bar for 'Quality dashboards'. A red callout box points to the search bar with the text 'Use the search bar to find your dashboard'. The search results are categorized into 'Recently Viewed', 'Aroma Dashboards', 'Coatis Dashboards', and 'Commercial Roadmap'. The 'Aroma Dashboards' section is expanded, showing 'KA - Aroma Performance Solutions Business' selected. To the right, there is a bar chart titled 'Customer Visits without Visit Report' showing record counts for various GBU categories.

GBU	Record Count
Novareze	821
Special Chem	166
Performance ...	105
Peroxides	90
Soda Ash & D...	88
Aroma Perfor..	43
Fibras	41
Silica	33
Coatis	23
g	9

Dashboard Folders

Cross GBU:	<p>Cross GBU dashboards</p> <div style="border: 1px solid #ccc; padding: 5px;"> <input type="text" value="Find reports and dashboards..."/> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Action</th> <th style="width: 90%;">Name</th> </tr> </thead> <tbody> <tr><td>▼ +</td><td>📊 User Management</td></tr> <tr><td>▼ +</td><td>📊 Webform dashboard</td></tr> <tr><td>▼ +</td><td>📊 VOC Dashboard</td></tr> <tr><td>▼ +</td><td>📊 Solvay Adoption & Executives Dashboard</td></tr> <tr><td>▼ +</td><td>📊 Quality dashboards</td></tr> <tr><td>▼ +</td><td>📊 BDM Dashboard</td></tr> <tr><td>▼ +</td><td>📊 Dashboard for Sales Managers per Rep</td></tr> <tr><td>▼ +</td><td>📊 SalesRep Dashboard</td></tr> <tr><td>▼ +</td><td>📊 Corporate CRM Program Dashboard PDCR ADOPTION DASHBOARD</td></tr> <tr><td>▼ +</td><td>📊 Solvay Users Adoption Dashboard</td></tr> </tbody> </table> </div>	Action	Name	▼ +	📊 User Management	▼ +	📊 Webform dashboard	▼ +	📊 VOC Dashboard	▼ +	📊 Solvay Adoption & Executives Dashboard	▼ +	📊 Quality dashboards	▼ +	📊 BDM Dashboard	▼ +	📊 Dashboard for Sales Managers per Rep	▼ +	📊 SalesRep Dashboard	▼ +	📊 Corporate CRM Program Dashboard PDCR ADOPTION DASHBOARD	▼ +	📊 Solvay Users Adoption Dashboard
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Here are some dashboard examples:

Dashboards for Sales manager per Rep – R2.1

Column 1: Follow-up Adoption Criteria

- Number of Logins per month
- Visit reports created per month
- Open Opportunities created per month
- Number of records created per month (2 bar charts)


Column 2: Monitor Business

- Open opportunities by stage: Funnel
- Top 5 open opportunities
- Open complaints with my team accounts
- Visits planned in coming months

Column 3: Administration

- Past customer visits without visit reports
- Visit reports without visit
- Opportunities with past closing date
- Opportunities without products or amount below 10k
- Task with a due date in the past
- Open opportunities with past first delivery date

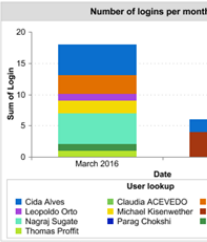
Here I can see the data of **Me** and **My Team** since **January** by team member



Sales Managers / executives

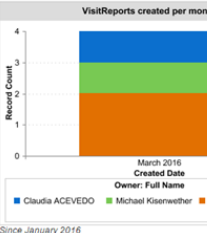
Follow-up Adoption Criteria

Number of logins per month

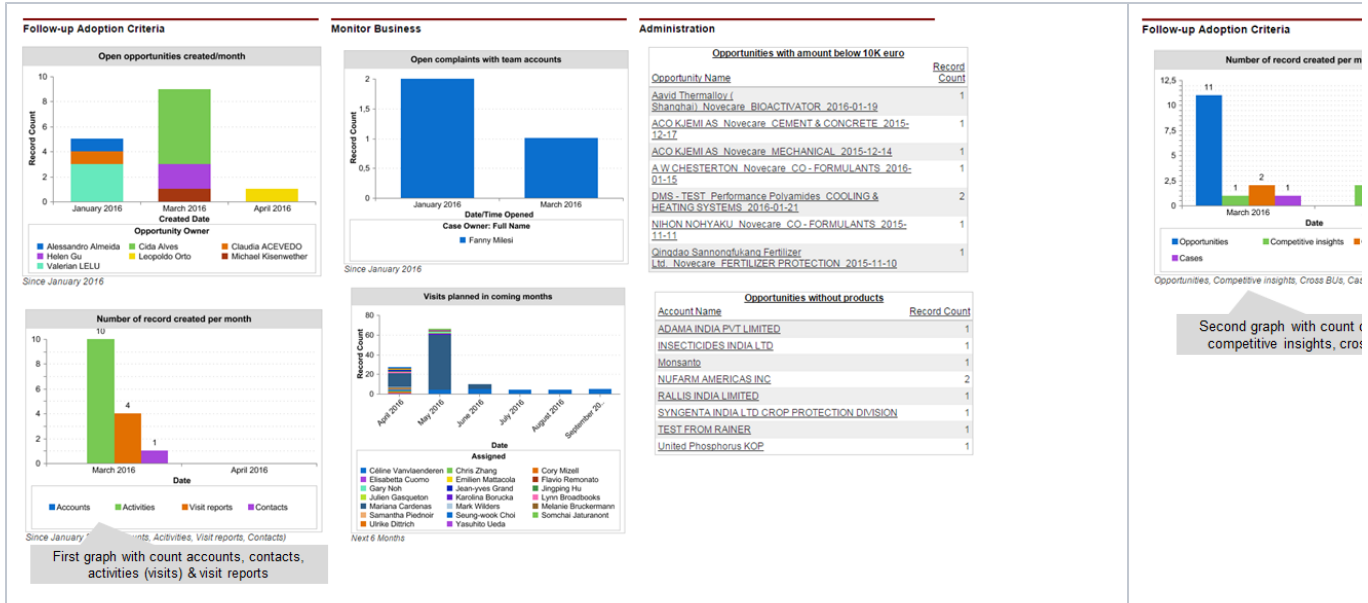


Since January 2016

VisitReports created per month



Since January 2016

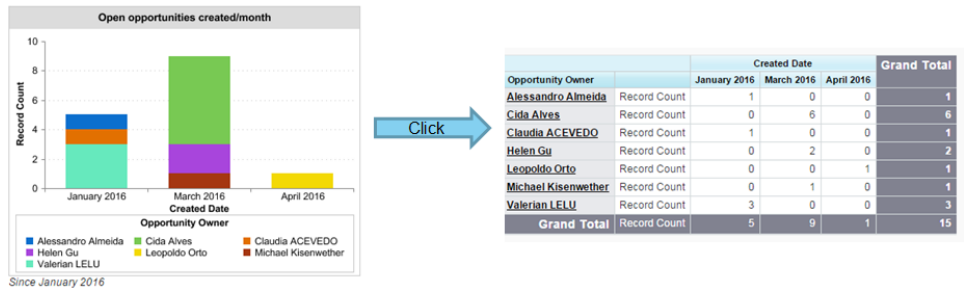


First graph with count accounts, contacts, activities (visits) & visit reports

Second graph with count competitive insights, cross

You can get a detailed view by clicking on the chart.

Example:



By clicking on 'View Details' on top of the page, you can see the list of records (e.g. opportunities) with the link to the record page.

BDM Dashboard

The DBM Dashboard has been developed specifically for **Business Development Managers** to manage and monitor **opportunities linked to their** region, stage, type, expected revenue.

Column 1:

- Opportunities by region

Column 2:

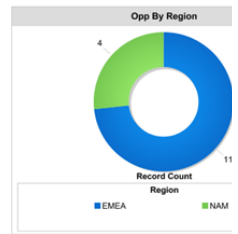
- Opportunities by stage
- Opportunities by type

Column 3:

- Opportunities by expected revenue



Here I can see only **data I have access to**.



This dashboard will be located in 'BDM dashboard' folder, and be named "**BDM dashboard**". This is a dynamic dashboard, used by all GBUs.

KAM Dashboard

The KAM Dashboard has been developed to manage and monitor activities and records in Salesforce linked to Key Accounts of the GBU. In this dashbo

Column 1:

- # of visit reports in the last 6 months
- Last 10 visit reports
- # of ADP created
- # of competitive insights

Column 2:

- # of complaint by status & shipping site
- Opportunities by region
- Last 10 opportunities

Column 3:

- All contacts by region & function
- # of contact by region
- # of contact per job department
- Opportunity by end use



Here I can see only **data I have access to**.

Filter By: Corporate Group
Region

Nbr of visit report in the last 6 months

Account: Region	Record Count
APAC	1
EMEA	5
LAM	1
NAM	5

Complaint by status & shipping site

Shipping Site	Status	Record Count
8082 / Benli	New	1
	Customer Informed	1
7424 / Chemix	Acknowledgement Sent	1
	Closed	1
7424 / Synstar	Under Review	1
	Approved	1
8090 / Drogas	Under Review	1
	Approved	1
ZFR / Clammy	New	1
	Customer Informed	1

All contacts by region & function

Region	Job Department	Record Count
APAC	General Management	1
	Purchasing	1
	Regulatory	1
	R&D	1
EMEA	General Management	1
	Purchasing	1
	Regulatory	1
	R&D	1
LAM	General Management	1
	Purchasing	1
	Regulatory	1
	R&D	1
NAM	General Management	1
	Purchasing	1
	Regulatory	1
	R&D	1

Nbr of ADP created

Account: Corporate Group: Account	Record Count
Novocare GBU: Name	1
SYNGENTA	0

Competitive insight

Competitor Name	Record Count
Lambers	1
Tamimco	1

Last 10 Visit reports

Date of the Visit	Account: Account Name	Record Count
04/05/2016	YUTIAN LIYANG	1
03/05/2016	BAYER CROP SCIENCE LP	1
21/03/2016	BAYER CROP SCIENCE LP	1
04/12/2015	FMC CORP	1
04/12/2015	BAYER SAS	1
02/12/2015	NUFARM	2
24/11/2015	BAYER S.A	1
17/11/2015	BAYER SAS	1
12/11/2015	Nudarm Asia Sdn Bhd	1
12/11/2015	BAYER SAS	1
Total		11

Opportunities by Region

Region	Sum of Expected Visits Revenue in EUR (Thousands)
APAC	300
EMEA	700

Number of all contacts by region

Region	Record Count
APAC	22
EMEA	23
LAM	5
NAM	33

Adoption Dashboards

The objective of adoption dashboards is to monitor the usage of [Salesforce.com](https://www.salesforce.com) in terms of logins, objects created and quality of objects created and updated. These reports allow to take action when there is any issue in adoption and to monitor whether licenses are justified.

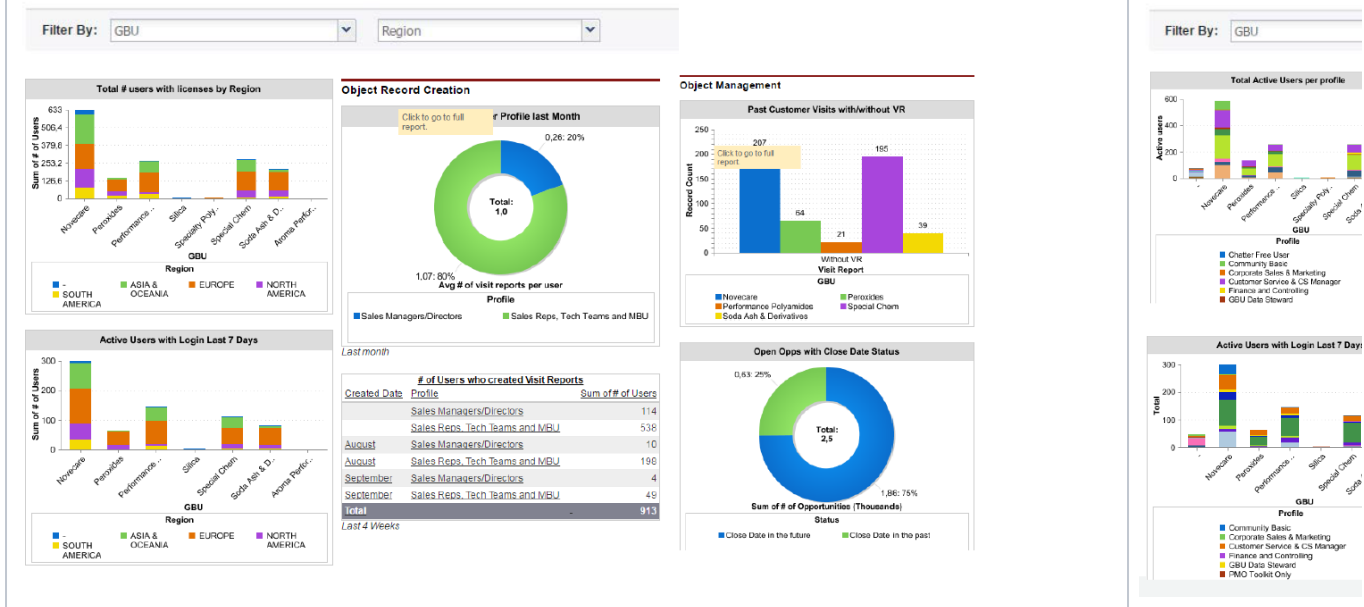
There are 3 types of adoption dashboards:

- Solvay Adoption & Executives Dashboard:** can be used by managers & CRM Champions (will be soon merged with the Solvay Executive Dashboard) to monitor the adoption figures by GBU and/or Region

- Solvay User Adoption Dashboard:** Can be used by the management and CRM Champions to follow up adoption figures user by user. Attention: Access to all users may be restricted for legal reason (e.g. not allowed to display data to all for German Work Council)

- Corporate CRM Program Dashboard:** Shows overall adoption figures for GBUs with monthly evolution. Is used mainly by the CRM Project Team but can be used by CRM Champions and GBU management.

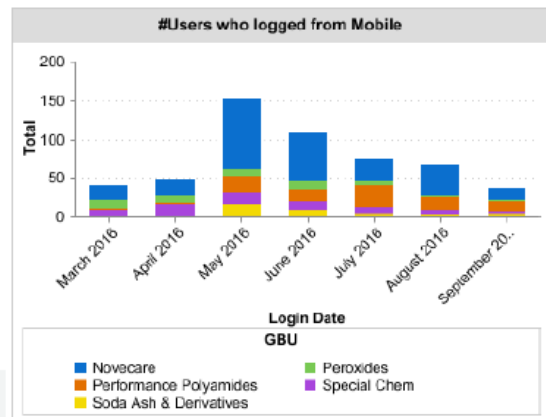
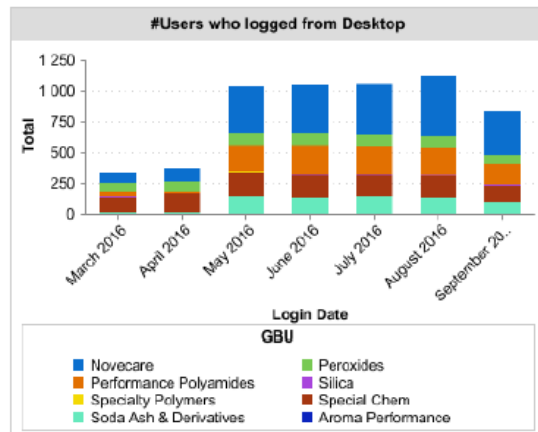
Solvay adoption & executive dashboard



Filter By: GBU

Region

Comparison Desktop vs Mobile



NB: Mobile = Salesforce1 App on iOS/Android and Mobile Browser on iOS/Android

Filter By: GBU

Login Status (Cross C

Login Date	Pro
29/08/2016 - 4/09/2016	Cor
29/08/2016 - 4/09/2016	Cus
29/08/2016 - 4/09/2016	Mar
29/08/2016 - 4/09/2016	Fin
29/08/2016 - 4/09/2016	GBU
29/08/2016 - 4/09/2016	PM
29/08/2016 - 4/09/2016	Sal
29/08/2016 - 4/09/2016	Sal
29/08/2016 - 4/09/2016	Str
Total	

- # of**
- Profile
 - Customer Service & CS
 - Sales Representative
 - Supply Chain & quality
 - Sales Manager/ Direct
 - Technical Team & Sale
 - Strategic Marketing
 - Community Basic
 - Finance and Controllin
 - Corporate Sales & Mar
 - GBU Data Steward

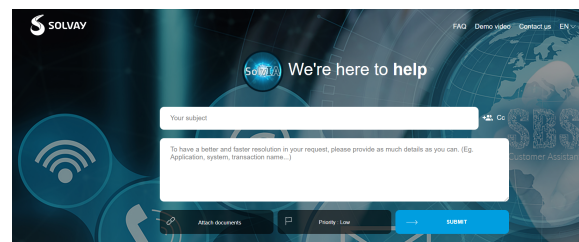
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Related articles

- [Introduction SFDC & Qlikview](#)
- [Reporting in SFDC - Definition](#)
- [Qlikview - Analytics](#)
- [Reporting in SFDC – Create reports in SFDC](#)
- [Opportunity with end use \(report\)](#)
- [Reporting on GBU Segmentation Fields 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